Mojo Surveys 2.6
User Guide

CRM 2013

Fusion Software Ltd

www.fusionsoftware.com

Version 2.6.0.2

Introduction

Welcome to the Mojo Surveys 2.6 User guide. The guide is intended to provide all the information needed for a Survey Designers use Mojo Surveys. We assume you have access to at least the trial version of Mojo Surveys and it has been setup by Fusion Software or an authorised partner.

We also suggest reading the Getting started guide available at http://www.fusionsoftware.com/docs/mojo-releases/getting-started-guide-13

For information regarding architecture, security or installation please contact Fusion Software at the contact details supplied at the end of this document.

If you want to talk through any aspects of Mojo Surveys, please feel free to contact us directly.

Survey Design

Just like any activity, it helps to plan ahead. Think about:

- What is the purpose of the survey? Measure, interact, promote?
- How the data is going to be used, what do you want to happen?
- How long the survey should be?
- What are you trying to measure?
- Should ***all*** the questions be asked of ***all*** respondents?
- Can you re-use all or part of an existing survey?
- Do you want to analyse results across surveys? If so you will need to utilise the Linked Question functionality.
- How are the invitations going to be sent?

Survey response rates can be improved if the survey if from a named contact with the organization, preferably known to the respondent. A profile image of the contact will increase response rates further.

Default survey

When Mojo Surveys is installed, a default survey is created that contains the settings that all new surveys inherit from. Before creating a batch of survey's we recommend setting up the default survey so that many of the survey settings (including header text, expiration date, Logo, Icon etc.) don't need to be re-keyed for each new survey.

Changing look and feel

Changing the way the survey looks is very easy in Mojo Surveys.

Images

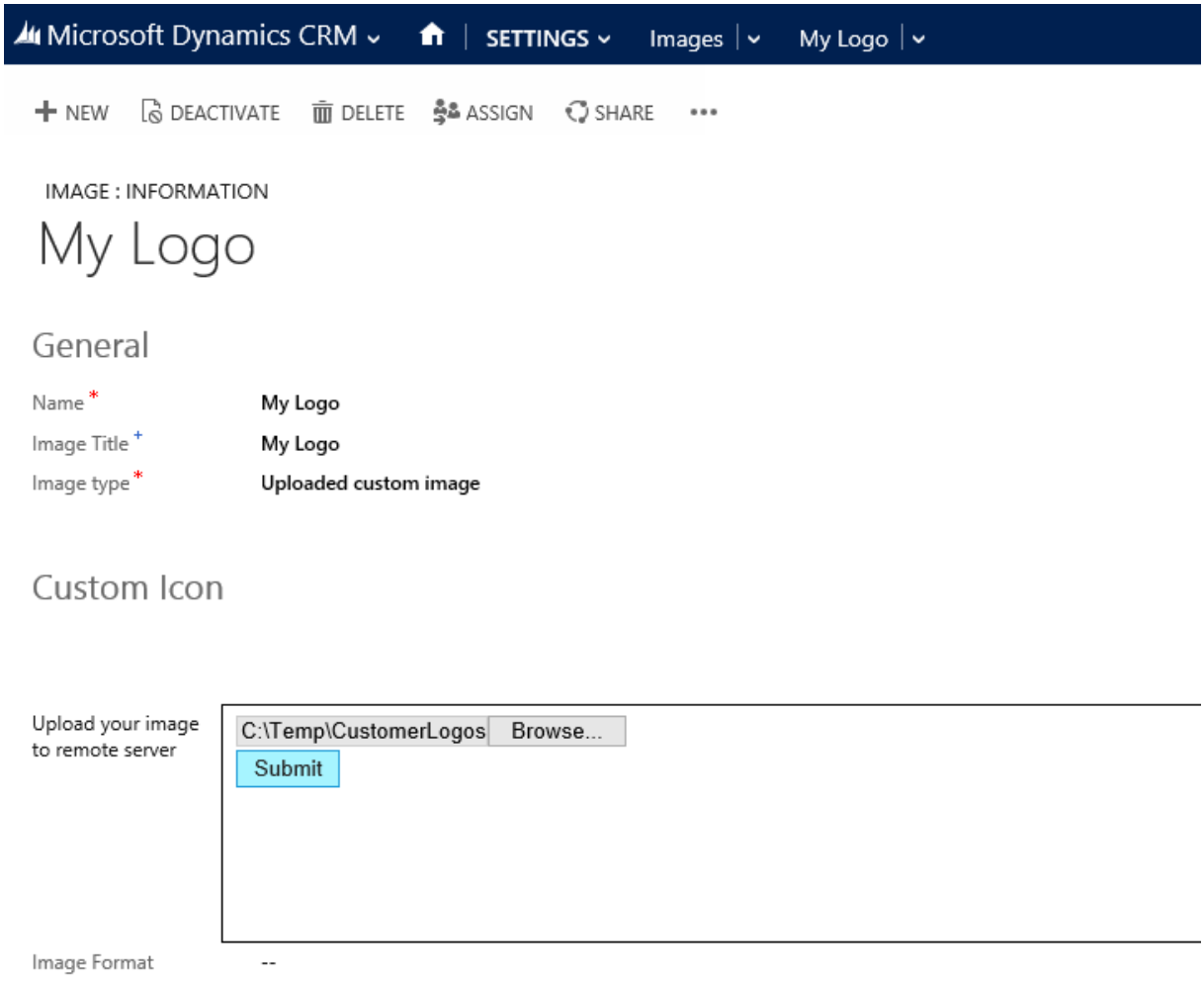
Images can be added to the header of the survey, to sections or embedded within question and answer text.

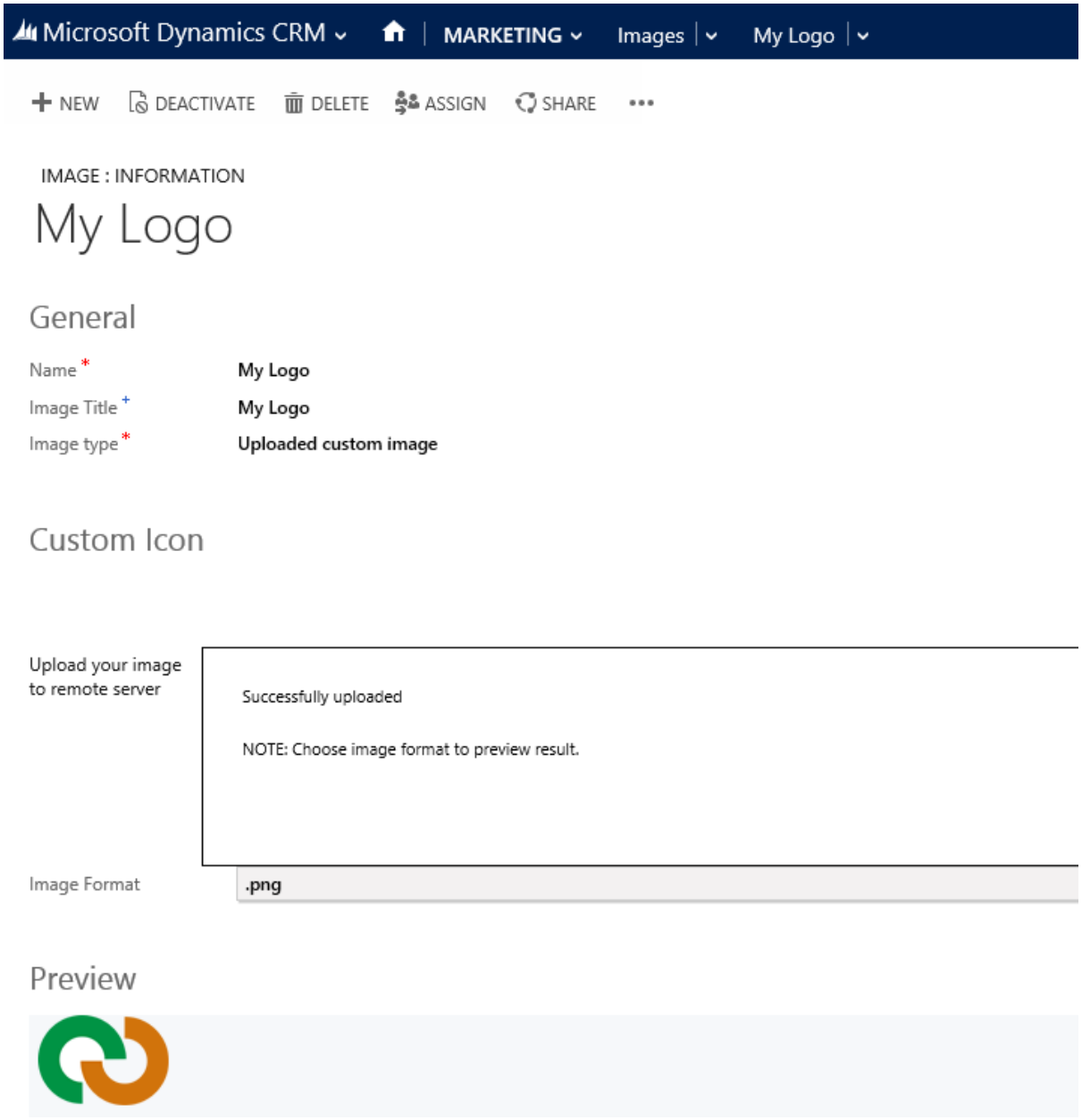
Uploading a custom logo

To upload an organization logo, create a new image record, by selecting 'Settings', 'Images' and then 'New'. Add a name, alternative name (for browsers that may not be able to show images), and an image title (tooltip for the image).

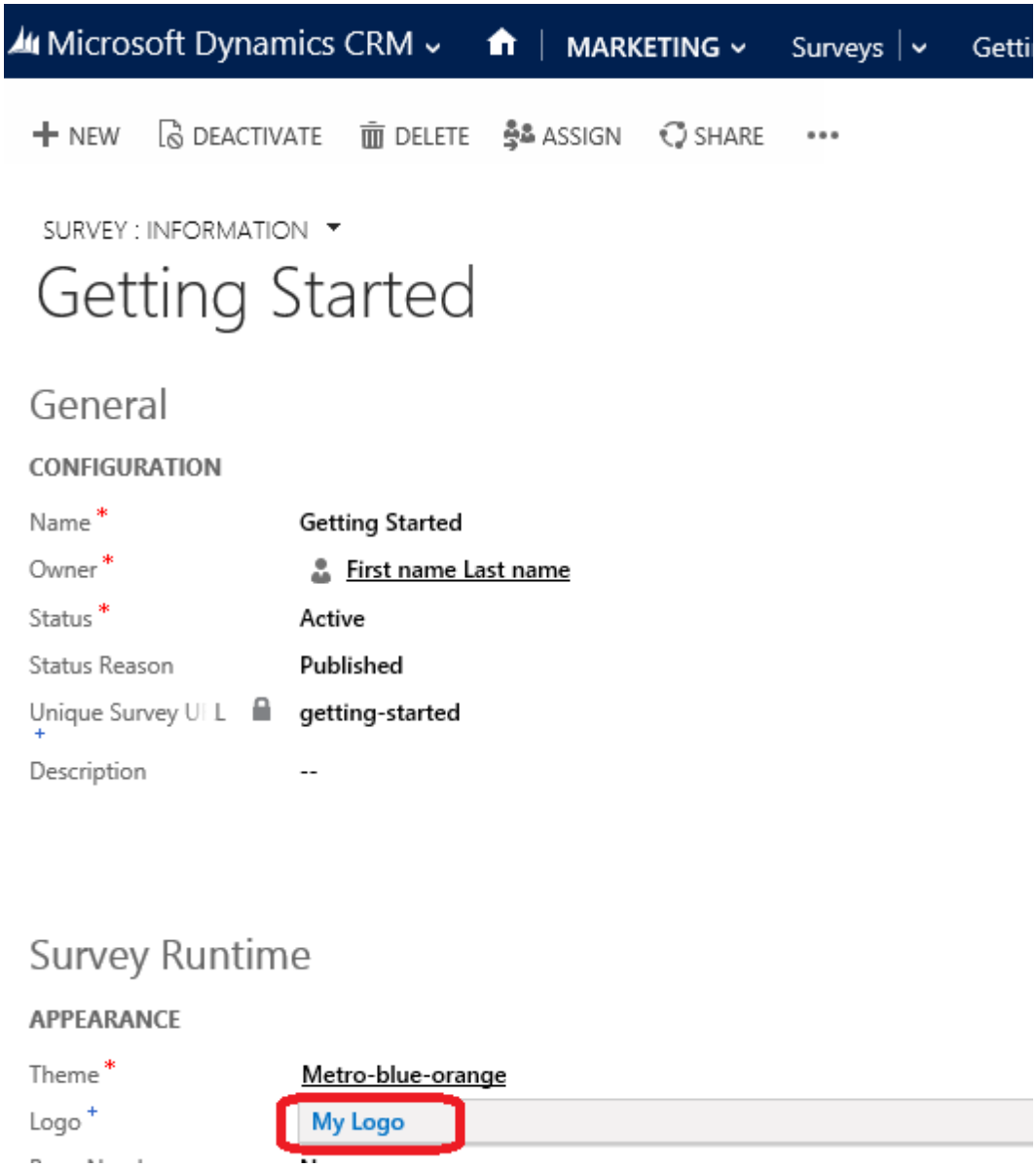
Choose 'Uploaded custom image' from 'Image Type' **and then click 'Save**'

Upload your image and when successful, choose the image format as described below:


Microsoft Dynamics CRM
SETTINGS
Images
My Logo
NEW
DEACTIVATE
DELETE
ASSIGN
SHARE
IMAGE : INFORMATION
My Logo
General
Name *
My Logo
Image Title +
My Logo
Image type *
Uploaded custom image
Custom Icon
Upload your image to remote server
C:\Temp\CustomerLogos
Browse...
Submit
Image Format
--

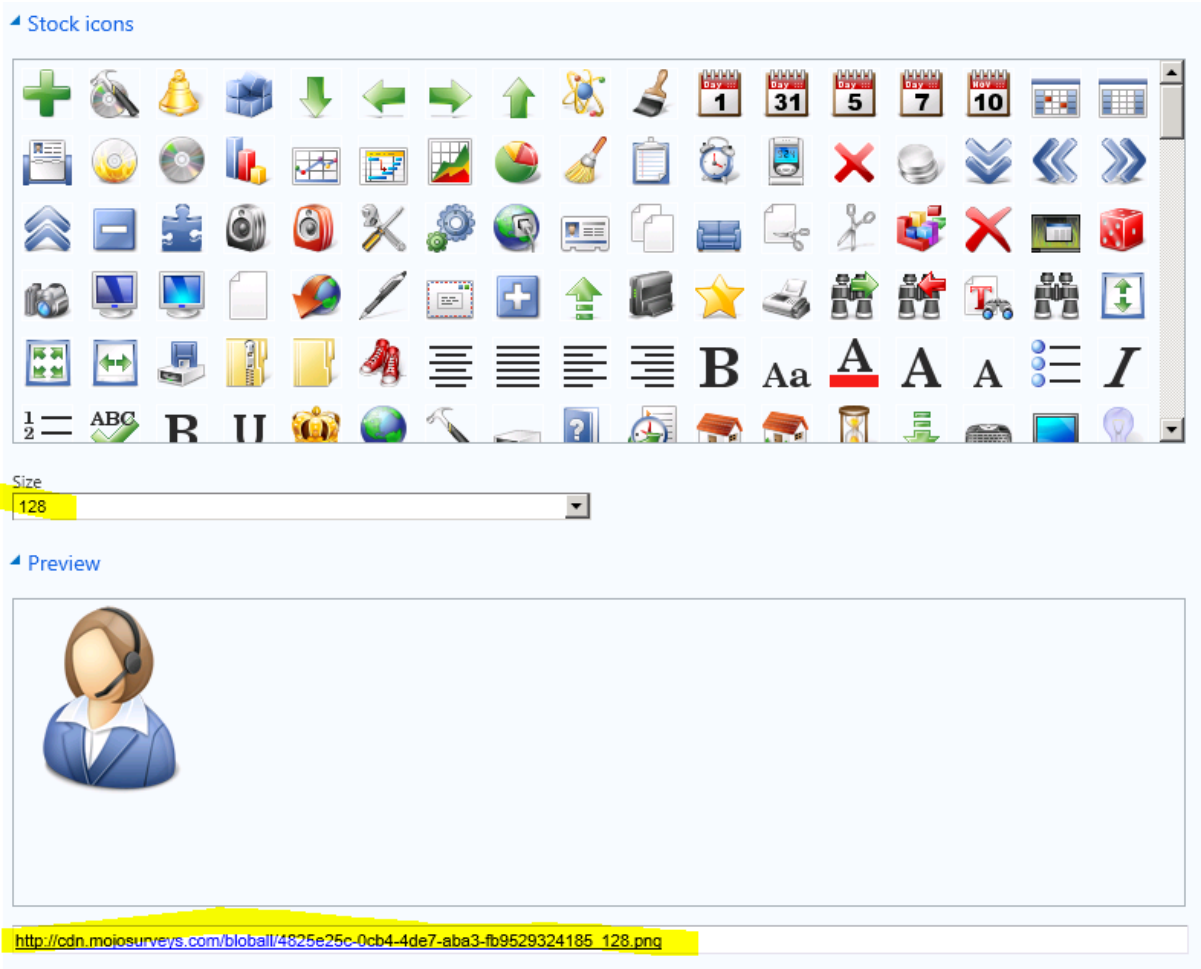


Within a survey (or the Default Survey) choose the image from the lookup



Using a stock image for a section

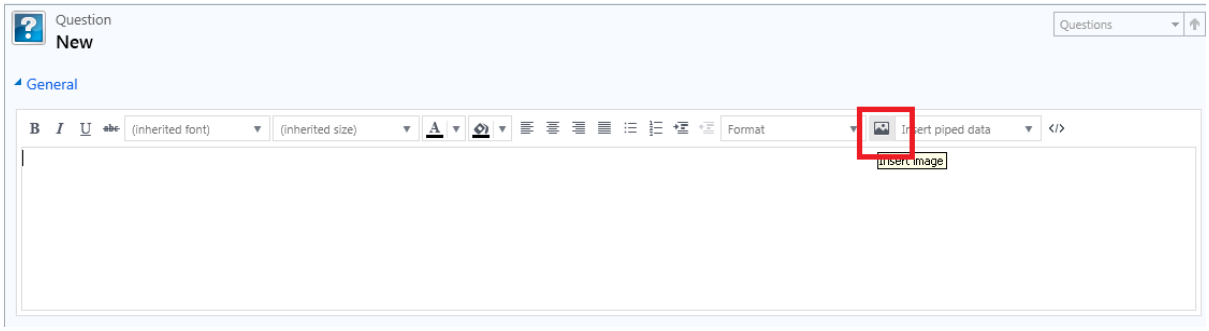
To include an image for use within a section, create a new image as described in the previous section Uploading a logo but this time choose 'Stock Image'. Then click on an image, and choose the size from the drop down.

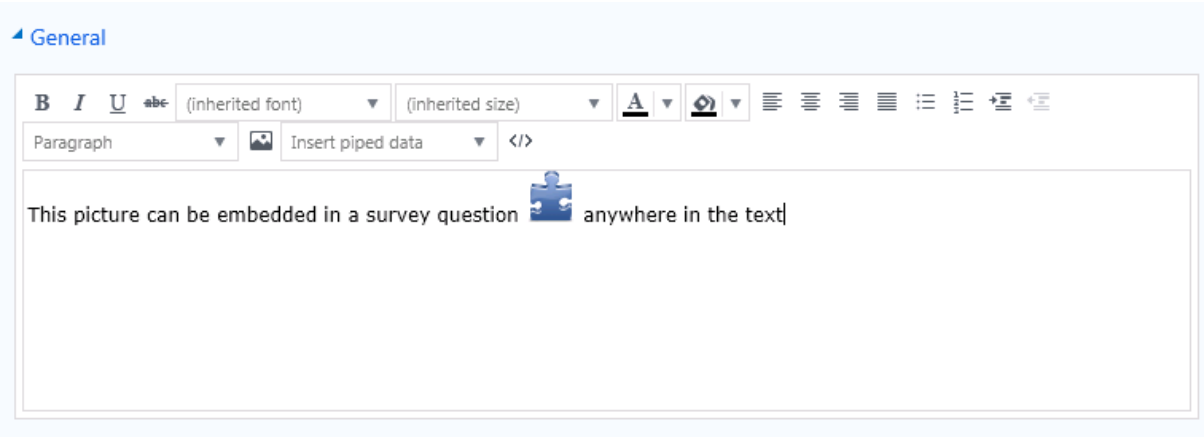


Please note the URL of the image is available at the bottom of the preview. This URL for the image can be embedded in Question, Grid, Description or Answer text.

Embedding Images in Questions and Answers

Images can be embedded within the text for grid, question, section or answers. For example if we create a description question and choose the 'Insert Image' toolbar, we can specify any URL, including links to your web site. However to avoid respondents getting a message from the browser that the image is coming from a different web site, it's preferable to upload the image as a custom image, and copy the URL at the bottom of the page.





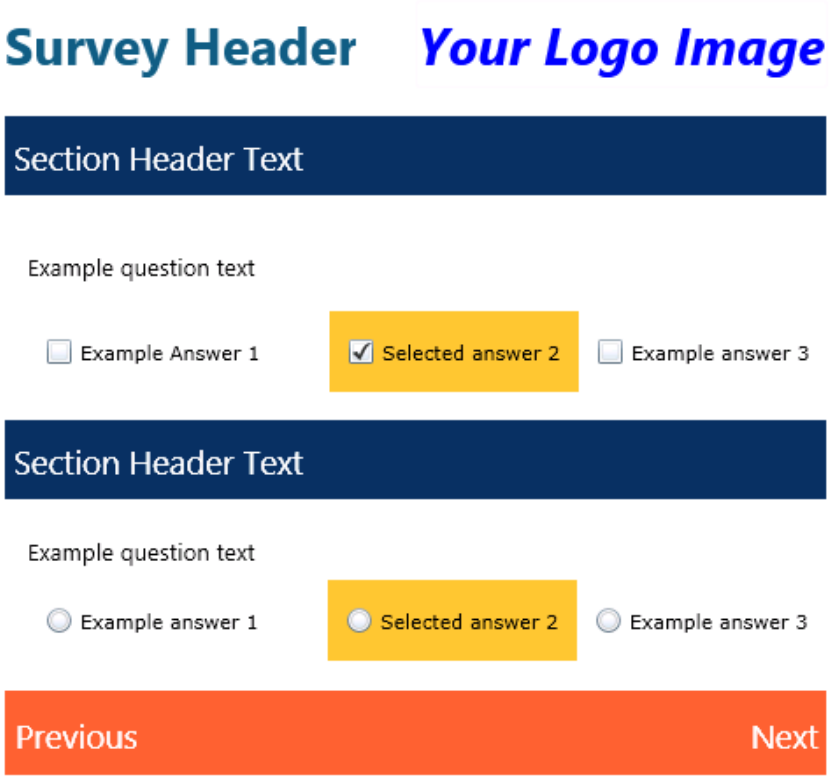
Also note that Grid columns (answers) can also contain custom images – instructions available upon request.

Theme

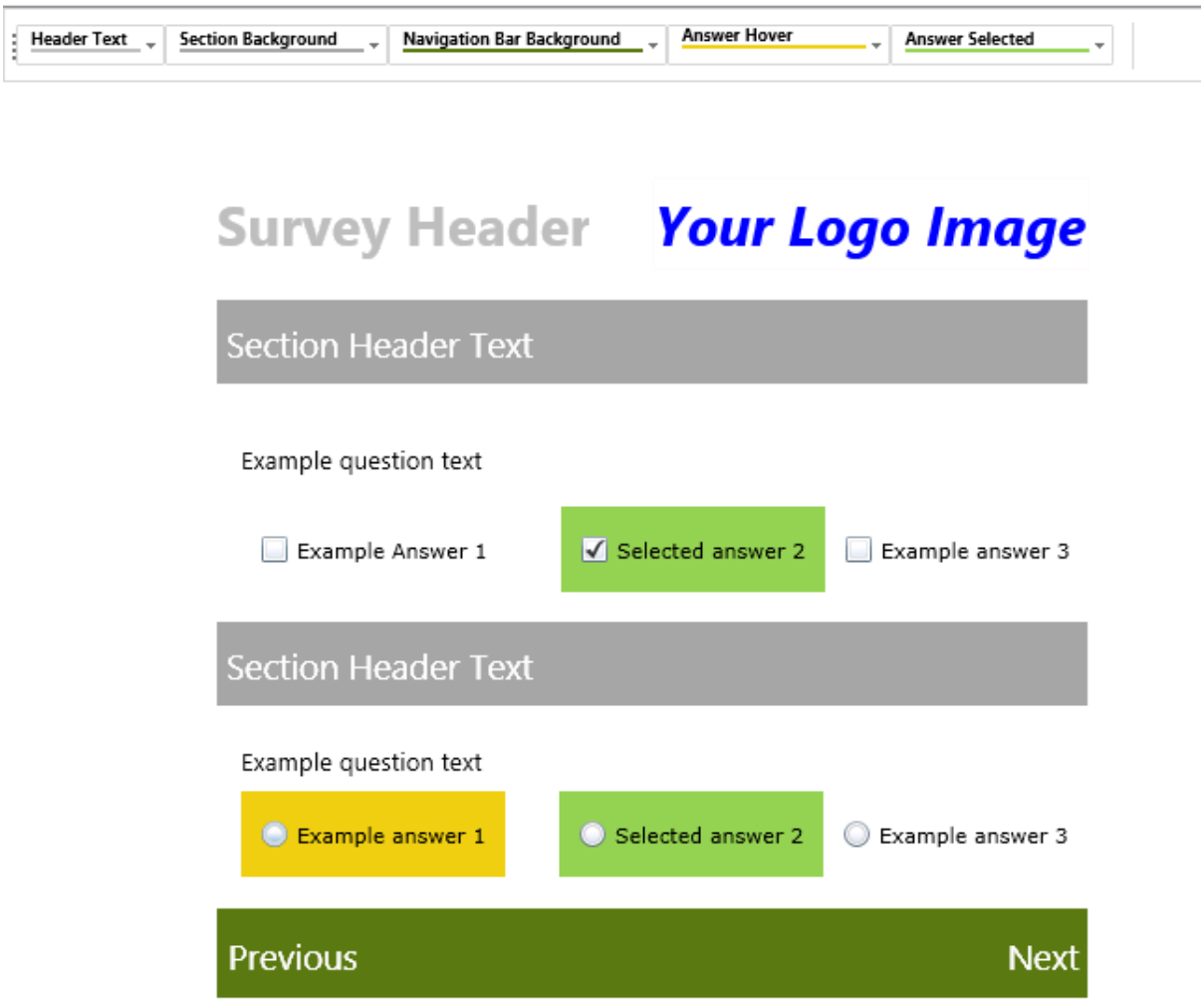
To create a new theme, open the survey you want to edit, and choose theme from the lookup and click ‘new’.

Enter the name of the theme and save the theme

After the record is saved, the theme designer is visible. Choose the colours at the top of the designer to match the desired look and feel.



Or for example



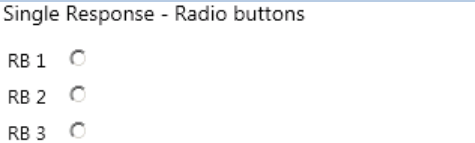
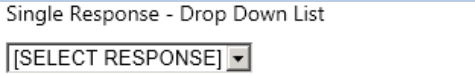
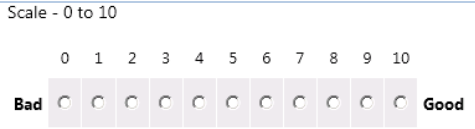
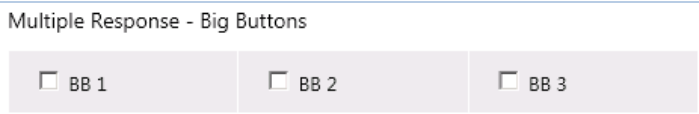
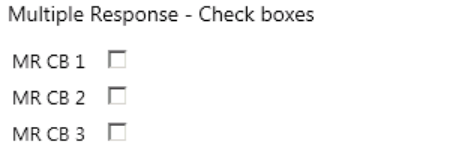
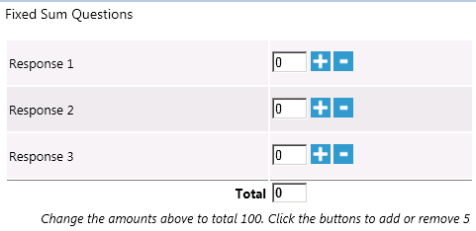
Alternatively, the CSS can be modified to control ***all*** aspects of the survey. Fusion Software or your partner of choice can help if required.

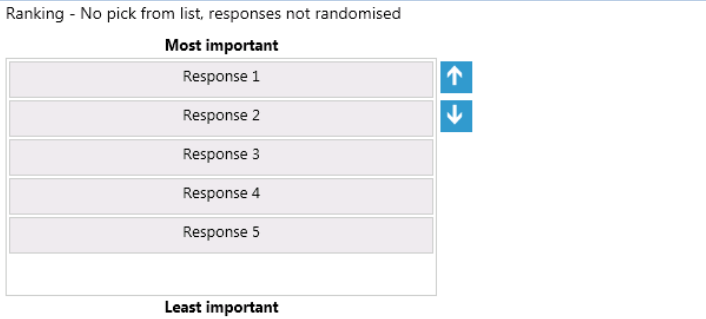
Question types at-a-glance

Below is a list of question types currently available with Mojo Surveys. The screenshots are taken from the 'Example Questions' survey included in the installation

Question Type	Sub Type	Logic	Used in Grid?	Mapping	Scores	Social Sharing	Required	Min	Max	Regular Expression	Linked Question	Notes	Preview
Description												Can include rich text formatting and links to images.	These questions demonstrate the ***basic*** questions of Mojo Surveys. Any text can be included anywhere in the survey using the built in editor. Including links to your own images such as this
Text Question	Single Line of Text	Y		Y			Y		Y	Y	Y		Text Question
	Multiple line of text	Y		Y			Y		Y		Y		Multiple line text box
	Email			Y			Y						Email: a@example.com
	Web			Y			Y					Respondents are required to include the http:// at the start of the URL	Web site http://www.bbc.co.uk

Numeric	Whole Numbers	Y					Y	Y	Y		Y		Numeric question (whole number) Enter numbers only
	Decimals	Y					Y	Y	Y		Y		Numeric question (decimals) Enter numbers only
Date Time							Y				Y	dd-mm-yy, mm-dd-yy, yy-mm-dd formats	Date and time question 03-04-2013
Rating	Stars	Y	Y	Y	Y		Y				Y	1-12 stars, half stars optional	Rating 1-5 stars (default)
	Smilies – Sad to happy	Y	Y	Y	Y		Y				Y	Other smiley sets available on request	Ratings - sad to happy
	Smilies – Neutral to happy	Y	Y	Y	Y		Y				Y	Other smiley sets available on request	Ratings - Neutral to happy
	Flags	Y	Y	Y	Y		Y				Y		Ratings - Flags

Single Response	Big Buttons	Y	Y	Y	Y		Y				Y		
	Radio Buttons	Y		Y	Y		Y				Y		
	Dropdown List	Y		Y	Y		Y				Y		
	Scale	Y		Y	Y	Y	Y				Y	Varying starting number and number of items	
Multi Response	Big Buttons	Y	Y	Y	Y		Y				Y	We prefer these as they are easier for the respondent to complete	
	Check boxes	Y		Y	Y		Y				Y		
Fixed Sum							Y					Total to 100. Great for respondents to choose how to allocate resources. Forces respondents to make the compromise.	

Ranking	Choose and Rank						Y					Best option for determining the actual priority. Is quality, security, price or features the most important factor?	
	Rank						Y						

Validation

There are a number of validation options per question type including

- Required – whether the respondent is required to enter a response
- Minimum
- Maximum
- Regular expression. Regular expressions allow custom validation such as the ability to validate a telephone number format or a social security number format. Fusion Software or your partner of choice can help implement these if help is required.

Social Sharing

Scale questions have the ability to share results via social media and allows 'promoters' to promote the results of a survey. Sharing is currently enabled through for following social networks

- Facebook
- Twitter
- LinkedIn
- Google +

Please take note of the following for social sharing to function properly:

- Social sharing is enabled only for maximum values of the range i.e. on a scale of 1- 5, only 5 would display the social
- Only one social sharing question can exist per survey
- The attribute 'Enable Social Sharing' must be checked on the survey to enable social sharing.

NPS

Net Promoter Score ® is a simple technique to measure customer loyalty and satisfaction – more information is available http://en.wikipedia.org/wiki/Net_Promoter

The NPS question is usually:

> *"How likely is it you would recommend [us/product/service] to a friend or colleague?"*

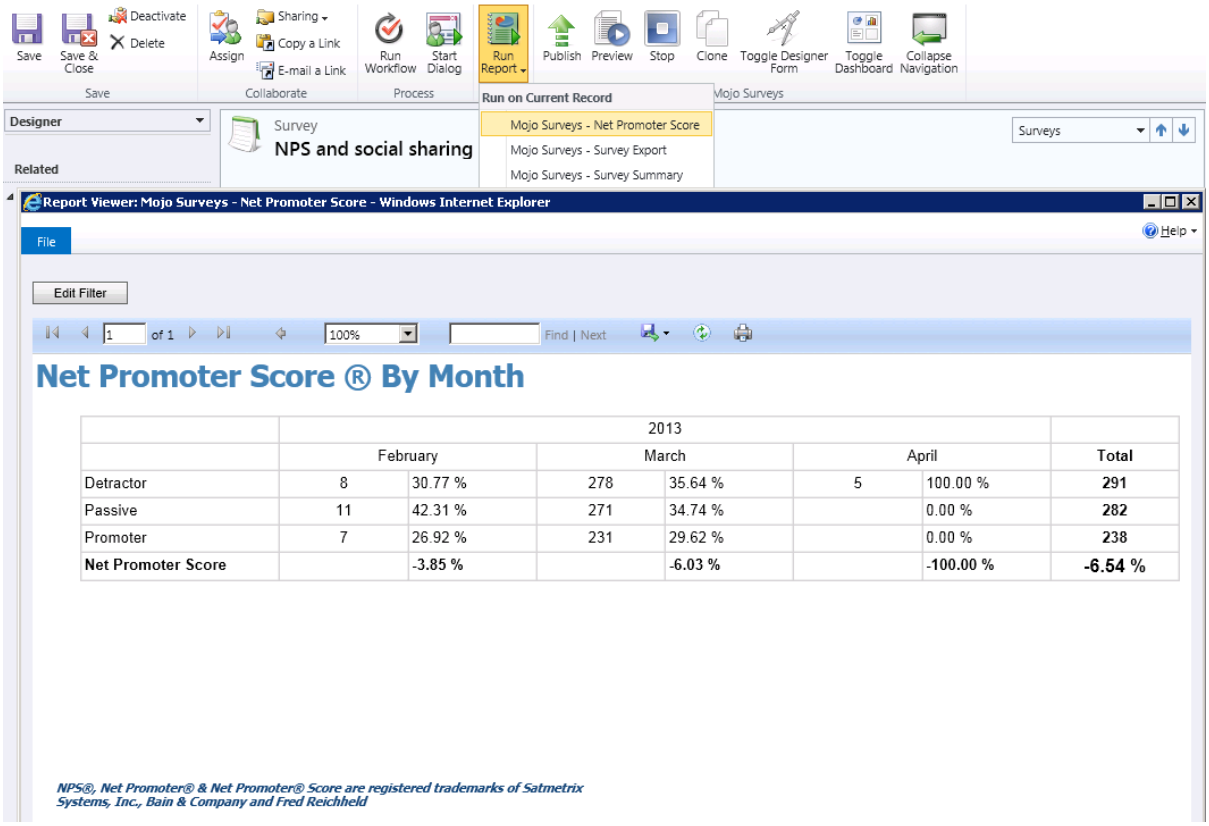
Mojo Surveys includes a NPS question type that can be added to the survey in the normal way and customized if required.

There should be only one NPS question type per survey. NPS questions have their own scoring system (-1 for detractors, 0 for passives, +1 for promoters) and the results are stored in the NPS mapping by default.

Social sharing can be enabled for NPS questions to enable promoters to promote their product (see social sharing section for more information).

Typically, NPS questions are used in conjunction with a follow-up question to ask why the respondent gave their rating. An example NPS survey is included with Mojo Surveys and the NPS section can be easily imported into any new survey (see importing sections).

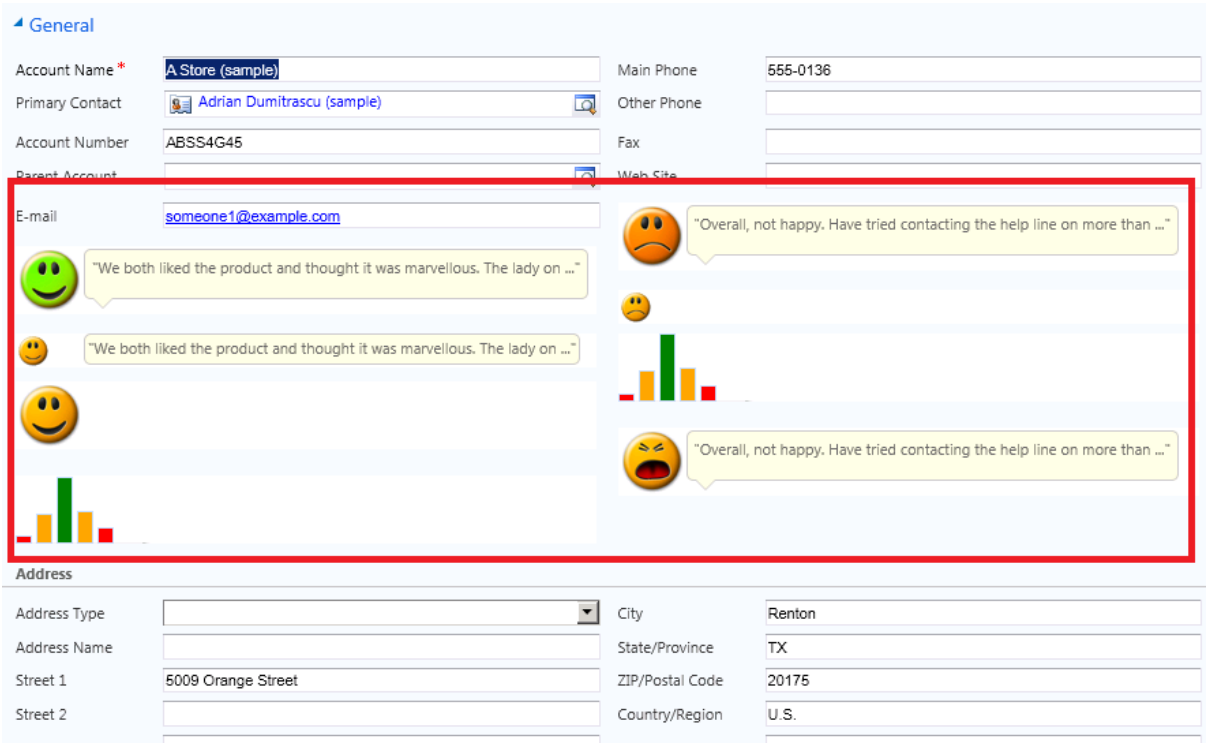
Reporting is available on a survey by survey basis – see screenshot below (using test data)



An important part of the NPS functionality is the ability to provide immediate feedback to the employee and this can easily be configured by including the user you want to notify in the Survey

Invitation ‘Notifications To’ field. A new workflow process should also be created from the template ‘Mojo Surveys - Template: NPS Notification of result’ template (Fusion Software or your partner can do this for you if required).

In addition, the result can be displayed on the customer record as a ‘smiley’ and in terms of the historical data (the screen shot below provides some different options available however only one would normally be displayed with perhaps the historical bar chart).



CES

Mojo Surveys includes a Customer Effort Score (CES) question type that allows respondents to score how much effort was put into making a purchase. The question text is usually

"How much effort did you personally have to put forth to handle your request?"

The CES question is similar to the NPS in that

- it is based on a scale question type
- high scoring results can be shared socially
- results are mapped by default to mapping "Customer Effort Score"

CSAT

Customer Satisfaction (CSAT) are the traditional survey satisfaction questions such as

"How satisfied are you with the service?"

Usually on a 1-5 or 10 scale.

So which question type is the best use to measure satisfaction or loyalty? The answer, as always is: 'It depends'. Please contact Fusion Software and we'll be more than happy to help design the right survey solution for your requirements.

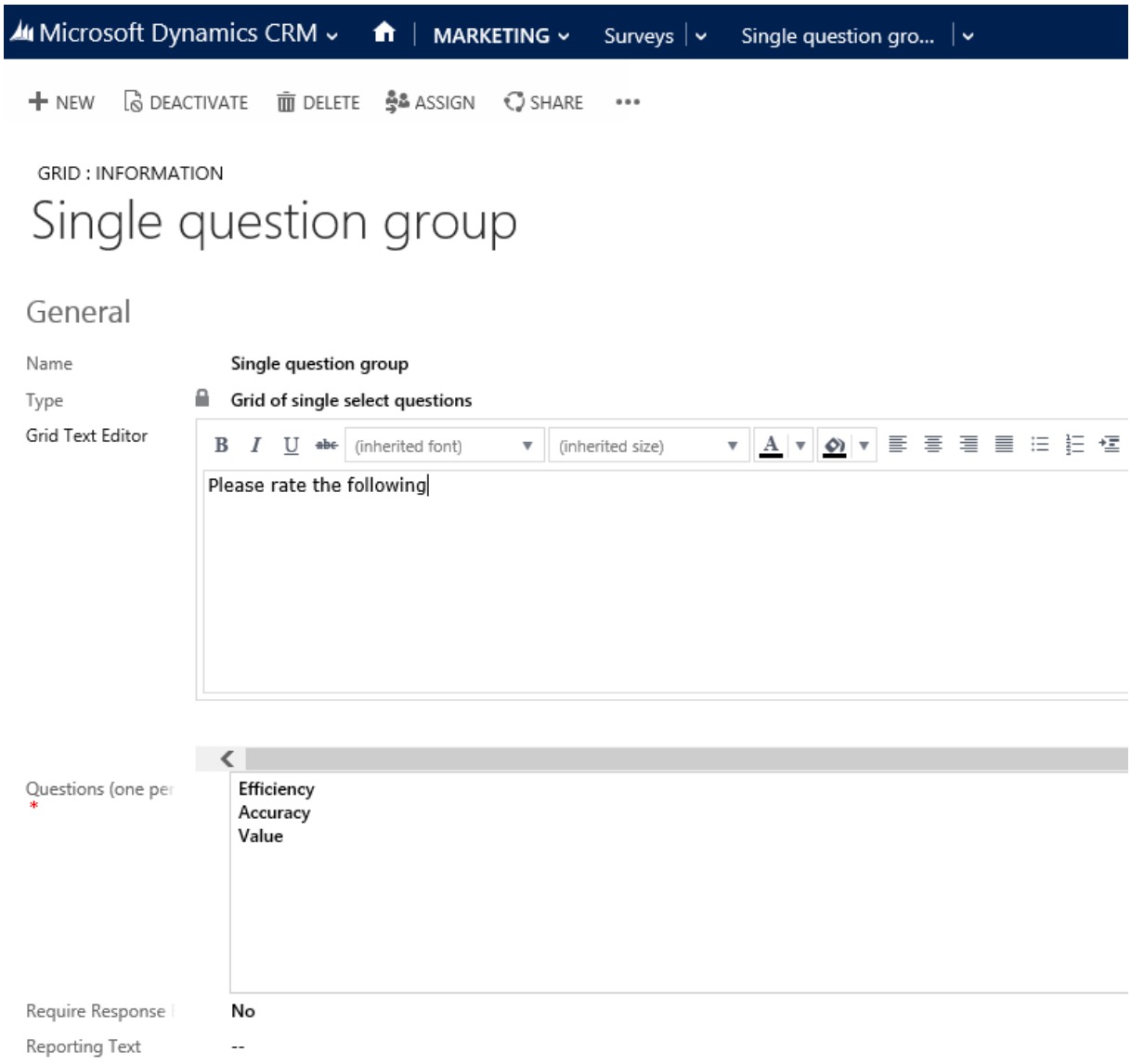
Grids

Mojo surveys has the ability to group questions together in a grid to make it easier for the respondent to answer.

Question types that can be used in a grid are:

- Ratings (smiley scales, stars and flags)
- Single response (big buttons)
- Multiple response (big buttons)

Mojo Survey Grids also have the option to use vertical text to ensure that less space is taken up on the survey and make it easier to complete on a mobile device. See screenshot below



Questions and answers can be linked in the normal way

Re-using Existing Questions or Surveys

Mojo Surveys offers several ways to re-use existing questions and sections to avoid needlessly re-entering the same questions.

Cloning Surveys

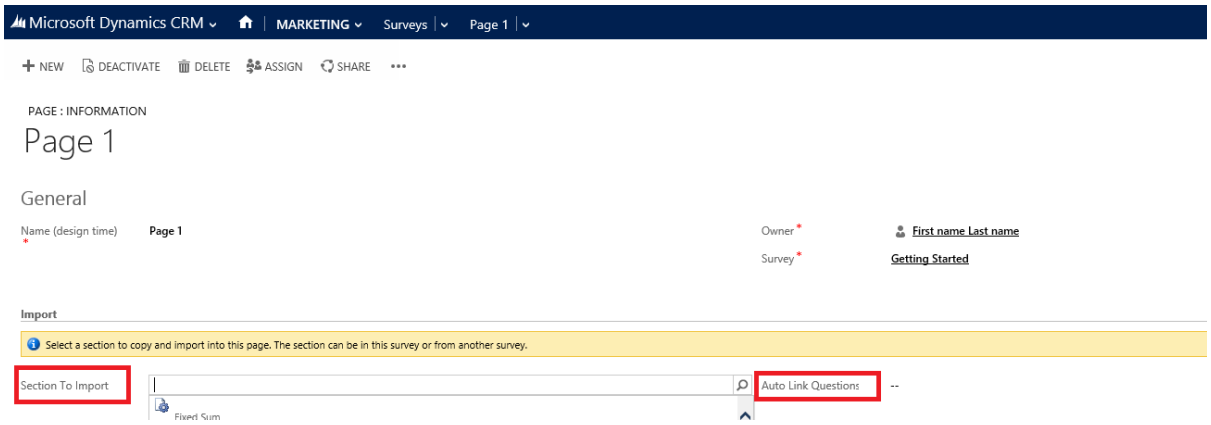
To clone a whole survey including all pages, sections, grids, questions and answers; simply click on the clone button in the survey ribbon. A new survey is created with the words " - cloned" appended at the end. The questions are completely separate from the first survey and any changes to either survey will not be reflected in the other survey.

If you wanted to clone a survey and replace all the text references with another, then consider using the import facility described in the import section. This is useful if you have a survey about 'Product A' and want to clone and use for 'Product B' without manually going through each question

Importing Sections

Often when designing surveys it is a particular *section* that you want to copy from another survey such as a demographic section or satisfaction section. To import a section follow these steps:

- Open the survey you want to import into, and switch to the survey designer.
- edit the page where you want to import the section into (as shown below)



Select whether you want to 'Auto Link Questions'. Auto Link Questions automatically creates, or uses an existing linked question for each new question imported.

Save the record

As with cloning the survey above, any question and answers that are imported are independent of the source survey i.e. changes made in one will NOT be reflected in the other. This has the advantage of any changes to one survey by one user will never accidentally be introduced into the other survey.

Linked Questions

Sometimes you may want to share questions between surveys for reporting purposes. So for example, you may have a common satisfaction question that you ask all respondents at the end of each survey and you want to report on that question from ALL surveys. In this case you would use a linked question. Another example where linking questions is recommended is for multi lingual surveys: you may clone the survey for 5 different languages, but what to report on the results across all languages.

Technical discussion: Why not use a many-to-many relationship so that a question can live in many surveys?

Well that's what we did initially, but it soon became clear that the 'question' should be split between the core meaning and its context. So for example a question such as 'How are you?' has the intrinsic meaning 'How are you?' but also there could be formatting of the text such as '*How are you?*', the position, scoring, pipes, mappings, and language could also vary per survey. The Linked Question entity is the many-to- many entity that holds the core meaning of the question, and the question is the context entity.

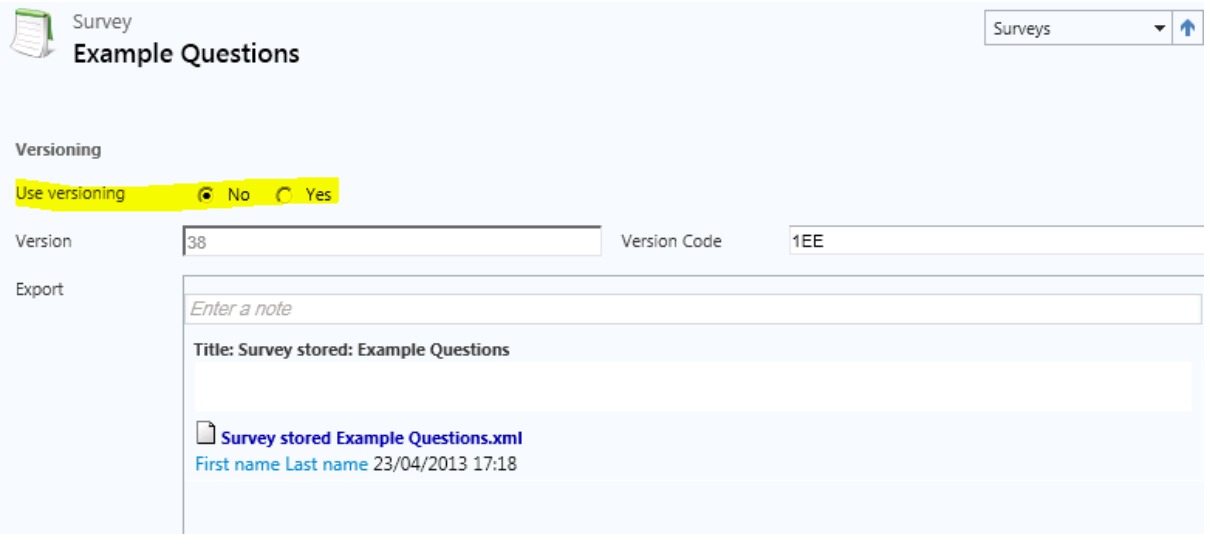
In addition, sharing a simple many-to-many question between many surveys introduces the possibility of unwanted changes from one survey being introduced into another.

Linking questions can also help with simplifying the reporting see section Mapping / Linked Answers

The easiest way to create a linked question is from the question itself, set 'Create Linked Question' to 'Link' and save the question. An on demand workflow is available to link multiple questions if required – often used with Advanced Find.

Versioning

Use versioning when you want the same survey to be sent to a respondent /or respondents over a period of time. You may want to compare results from a survey over a long period of time and don't want any changes to the survey to be presented to the respondent as this would invalidate comparisons.



When surveys are configured to use versioning (it is off by default) the survey invitation URL's have an appended parameter:

No Versioning:

https://www.mojosurveys.com/Demo2/versioningdemo/Eyo9TLM1EeKtPwAVXSMOHGe7Djo1

With Versioning:

https://www.mojosurveys.com/Demo2/versioningdemo/u8-w4rM1EeKtPwAVXSMOHBSrtTk1/D

The additional parameter tells the survey web app which version of the survey to use.

It is important to note that if surveys that are configured to use versioning are changed, any previously sent out invitations will continue to use the old survey, and cannot be changed using the survey designer. So typos and question changes can ***NOT*** be made other than via a support request.

Moving between environments

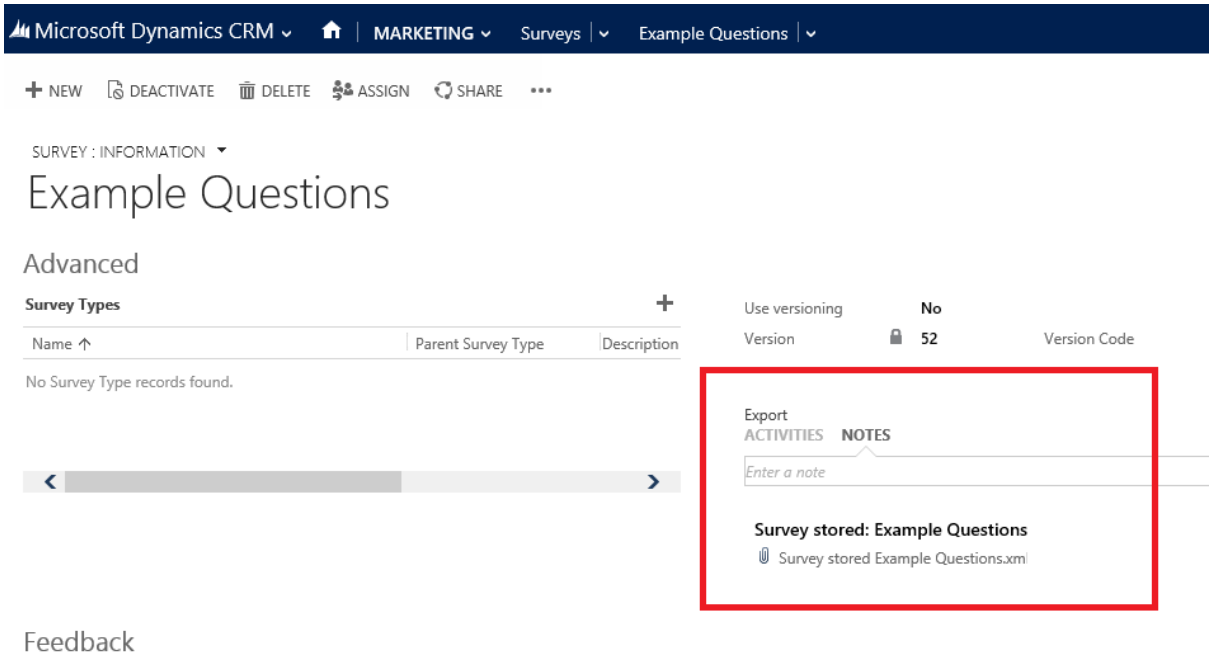
Typically Mojo Surveys may be developed and/or tested in one environment and exported to the live environment.

To export a survey to a new environment, there are two options:

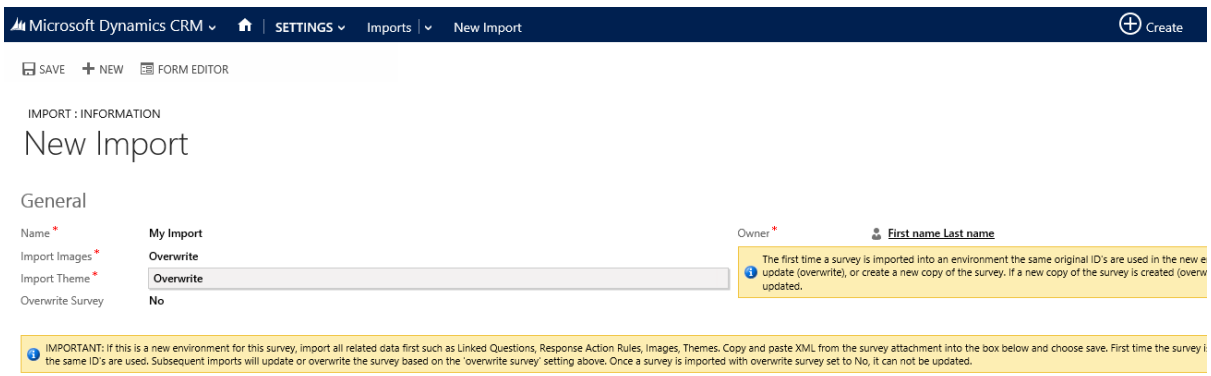
- Manually copy the file survey xml across
- Use the Mojo Surveys admin application

Manually copying the surveys

Download the survey xml from the source survey as shown in the screenshot below:



Create a new Import entity that can be found under 'settings'


Microsoft Dynamics CRM
SETTINGS
Imports
New Import
Create
SAVE
NEW
FORM EDITOR
IMPORT : INFORMATION
New Import
General
Name
My Import
Import Images
Overwrite
Import Theme
Overwrite
Overwrite Survey
No
Owner
First name Last name
IMPORTANT: If this is a new environment for this survey, import all related data first such as Linked Questions, Response Action Rules, Images, Themes. Copy and paste XML from the survey attachment into the box below and choose save. First time the survey i
the same ID's are used. Subsequent imports will update or overwrite the survey based on the 'overwrite survey' setting above. Once a survey is imported with overwrite survey set to No, it can not be updated.

Paste the XML from the source survey into the text box at the bottom of the import form.

Particular attention must be given to the 'Overwrite Survey' section. If you want to create a copy of the survey, choose no. If you want to overwrite the survey choose 'Yes'. If you choose 'No' the

newly created survey can NOT be overwritten subsequently (as new ID's for each element is created).

Usefully, text can be replaced on the import, so that all references to a particular product, service or subject can be replaced with another at the time of import.

When the import record is saved, the survey is created.

Points to note when deploying to a new environment:

- Peripheral entities such as Pipes, Linked Questions, Themes, Response Actions, Survey Responses and Survey Invitations are not deployed and these could be manually via export/ data import.
- Any custom attributes that have been added by your organization to any of the entities, won't be populated

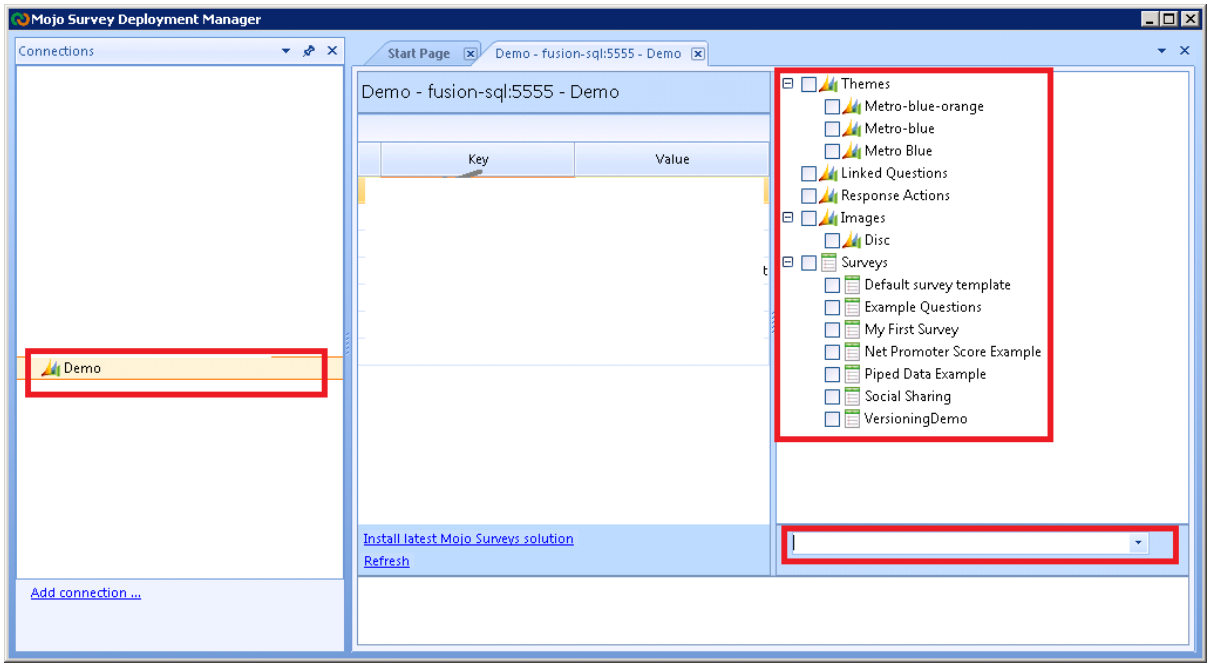
Deployment via the Deployment Manager

The Deployment Manager makes deployment to new environments much easier as it can copy over some of the peripheral entities.

To automatically copy the survey application via the admin application:

Start the Mojo Surveys Admin application and connect to the environment you want to install into. Then connect to the environment you want to install from.

On the environment you want to export **from**, choose what you want to export by selecting the check boxes in the tree view on the right hand side. Then choose the environment you want to export **to** from the drop down list on the bottom right (see screenshot below – with some sensitive information removed).



Survey Runtime Routing

Mojo Surveys have two types of logic,

- client-side logic runs in the survey based on answers the respondent gives
- Server-side logic runs when survey responses are received and determines what actions, if any, should be taken. This section relates to client side logic, a later section relates to server side logic.

Client side routing

Client side logic is implemented with the use of Routing entities that are related to the survey.

Client side routing is important to keep the survey relevant to the respondent and interactive.

A word of advice. Don't try to create a huge logic tree with hundreds of combinations, it will make your testing a lot harder to do. Also, consider splitting surveys into multiple smaller surveys and conditionally sending invites to a different group of people.

There are four type of routings:

Skip

Skip to a section, question or grid based on the answer of a question.

End survey

Go straight to the end of the survey. Useful for qualification questions.

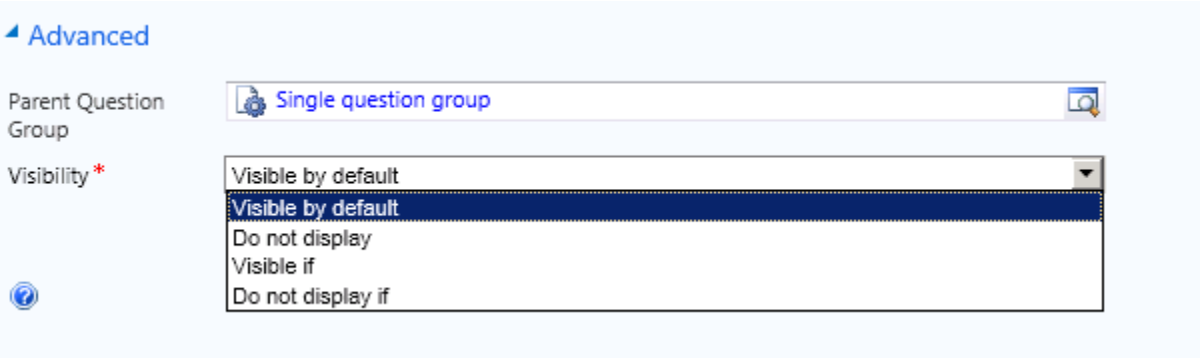
Hide or show

Hide or show a page, section, grid or question based on the answer of a question. Typical uses are to show a comments section if a high or low rating is received.

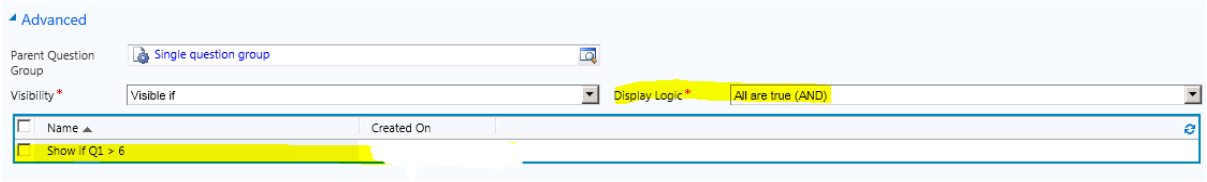
Conditional visibility

Hide or show a section, grid or question based on the response of one or more questions previous pages. Typically this is useful if you have a question at the end of the survey such as 'Can we contact you about this?' if the respondent has expressed dissatisfaction at any point in the survey.

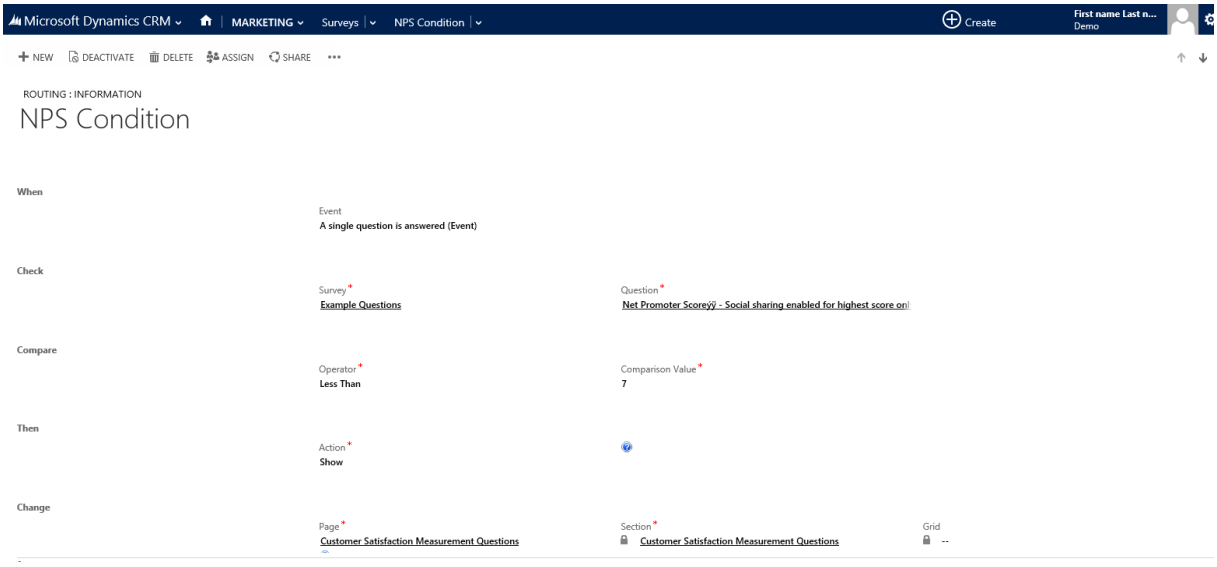
Visibility can be set by selecting the advanced tab and choosing an option (all sections, grids and questions are visible by default).



To enable conditional visibility choose 'Visible if' or 'Do not display if' and the 'Display Logic' field and routing sub grid is now available.



Select the sub grid and choose Add New Routing



Multiple routings can be chosen so that ALL or ANY of the routings conditions have to be met before the survey object is hidden or displayed.

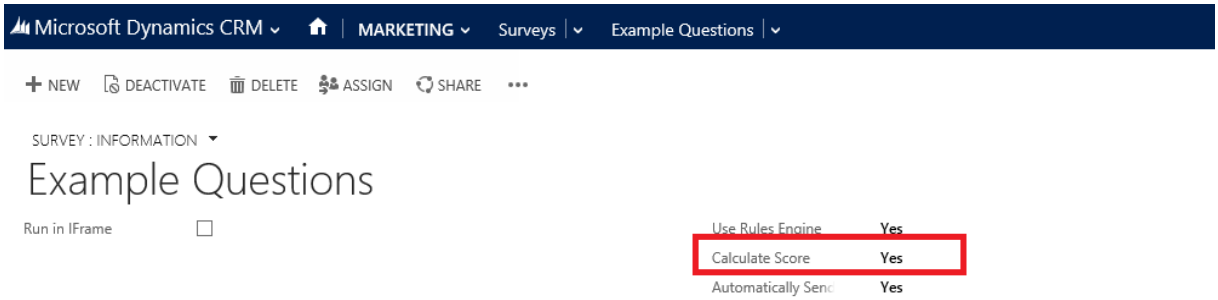
Note: The routing checks must refer to questions on previous pages to the question that is being made visible or hidden.

Answer weighting / Scoring

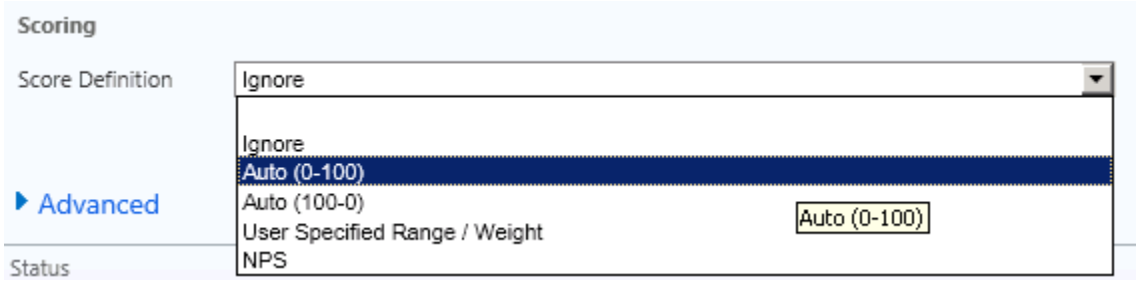
A great feature of Mojo Surveys is the ability to score individual questions or a group of questions in a survey. This has several great applications:

- Create a custom index to measure loyalty, satisfaction, pain, happiness, or any aspect based on more than one question, or more than one methodology. For example you may choose to use Net Promoter Score as one measure and compare its effectiveness against a combination of Customer Effort Score and a service rating.
- Take actions based on the total score of the survey. Rather than take actions based on individual questions, it is possible to take action based on a total score. E.g. a customer may answer that they are satisfied to one question, but not satisfied to many others. In this case it is possible to schedule a follow up appointment if the satisfaction index is less than 50% irrespective of the response to a single satisfaction question.

To configure scoring, the survey field 'Calculate Scoring' must be set to be 'Yes'



And the individual questions must be configured for scoring – these are typically single response questions or ratings:



The options are:

Option	Description
Ignore	No not score
Auto (0 -100)	Min value is assigned 0 points, max 100 points
Auto (100-0)	Max value is assigned 100 points, min value 0 points
User Specified Range / Weight	The 'left most' value is assigned the Score Min value that you specify. The Score Max value is the right most value.

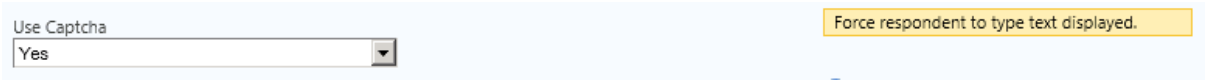
	Note: By specifying 10 in the minimum value and 1 in the maximum value, the field scoring can be reversed.
NPS	Net Promoter Score scoring type. Used specifically for Net Promoter Score

The score is calculated as two percentages on the survey response:

- Score as a percentage – this is the score of the questions answered (note that logic on the client side may mean not all questions are presented to the respondent)
- Score as a percentage all routes – this is score of the questions answered divided by all the total possible score (irrespective if they were presented to the respondent)

Captcha

Note: Captcha's are available on particular deployments – please contact Fusion Software before using in a production environment.



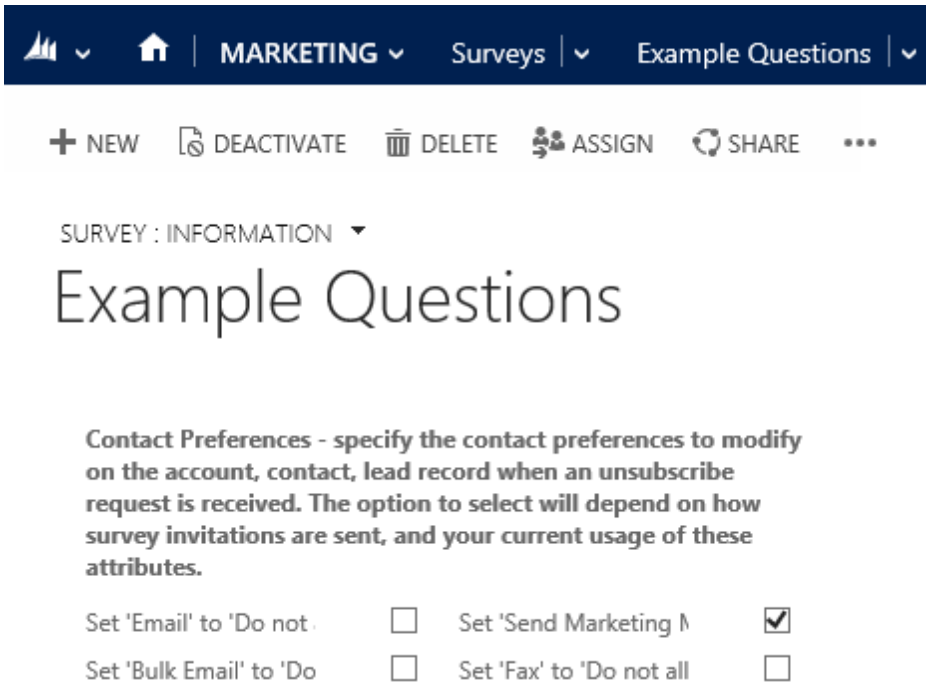
This will present a page at the start of the survey such as this

Unsubscribe

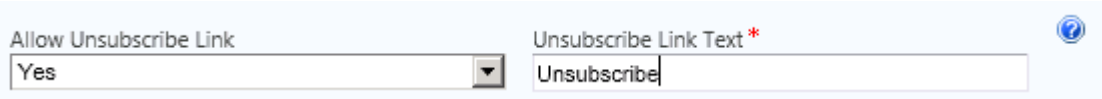
Mojo surveys can be configured to have an 'Unsubscribe' link at the bottom of the survey. If configured this will redirect the customer to another survey whereby the respondent can be prompted with questions to capture reasons for unsubscribing. When the response is received back in CRM the customer's contact preferences can be updated to prevent further surveys being sent. Unsubscribes work only for known Customer records in CRM and not for anonymous surveys.

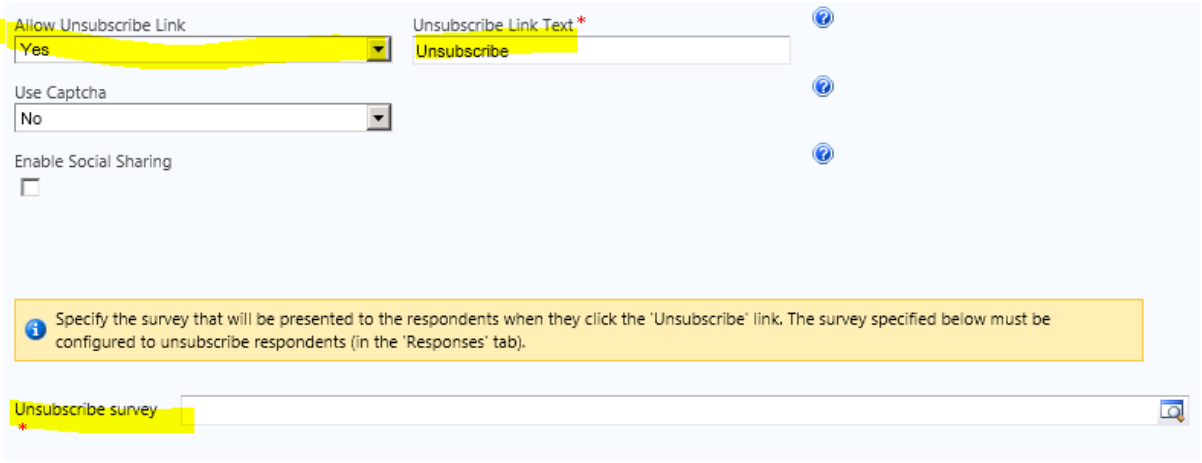
To configure unsubscribing:

1. Create a new unsubscribe survey that contains the question you want to ask the respondent for the reasons of unsubscribing
2. On the unsubscribe survey, remove the welcome page and add the questions.
3. Configure the unsubscribe survey as below


MARKETING
Surveys
Example Questions
NEW
DEACTIVATE
DELETE
ASSIGN
SHARE
SURVEY : INFORMATION
Example Questions
Contact Preferences - specify the contact preferences to modify on the account, contact, lead record when an unsubscribe request is received. The option to select will depend on how survey invitations are sent, and your current usage of these attributes.
Set 'Email' to 'Do not
Set 'Send Marketing M
Set 'Bulk Email' to 'Do
Set 'Fax' to 'Do not all

4. Then, on the source survey that you want to have the unsubscribe link, configure the unsubscribe as follows:




Allow Unsubscribe Link
Yes
Unsubscribe Link Text *
Unsubscribe
Use Captcha
No
Enable Social Sharing
Specify the survey that will be presented to the respondents when they click the 'Unsubscribe' link. The survey specified below must be configured to unsubscribe respondents (in the 'Responses' tab).
Unsubscribe survey *

When a survey is completed for a specific customer, and the unsubscribe link is checked, the respondent is redirected to the unsubscribe survey.

Survey Distribution

There are many ways to invite respondents to take part in a survey depending on how you want to send the invitation out, whether you want non- anonymous responses and whether you want to pipe data to the survey.

Simply put, surveys can either be

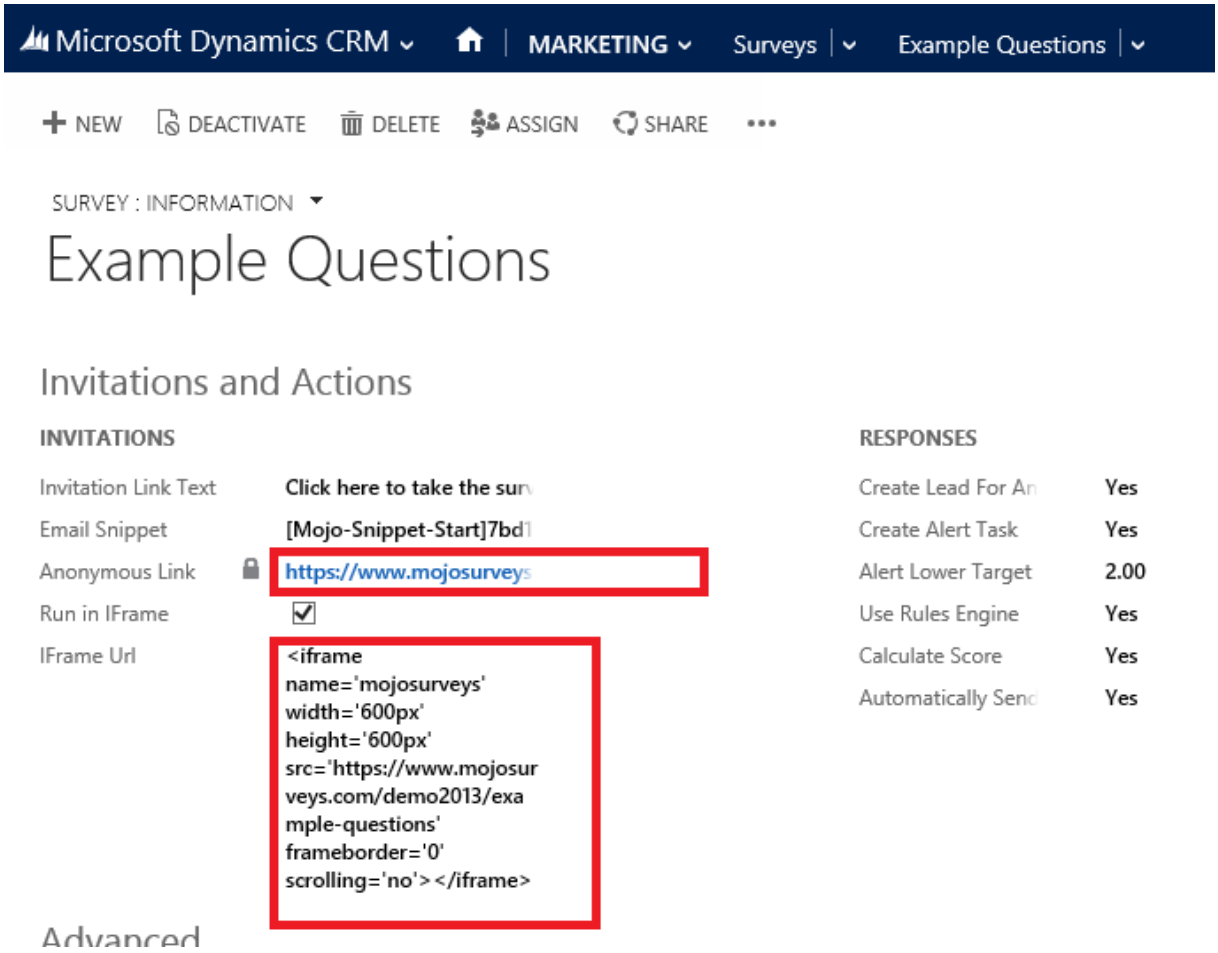
- Anonymous - respondents are not known in CRM and a link to the survey can be distributed via any media such as twitter or Facebook. For example lead capture on a web page.
- Non-anonymous – survey invites are to specific individual existing CRM contact/account/lead. E.g. Post purchase review

The table below describes how invitations can be sent and various triggers available

	Media	Trigger	Invitations can be piped	Response in CRM	Comments
Anonymous	Any	Any	No	Create lead	
Email Template	Email	Direct Email / Workflow / Campaign / Quick Campaign / Email Merge/ Manual email	Yes	Account / Contact / Lead / Regarding	Need to create a template per survey
Email	Email	Workflow / Campaign / Quick Campaign / Manual email	Yes (for workflows)	Account / Contact / Lead / Regarding	
Invitations only	For subsequent use with any media	Any	Yes (for workflows)	Account / Contact / Lead / Regarding	Useful for integration with third party email providers. Generate the URL and use as per required

Anonymous

If the survey is configured to allow for anonymous respondents, the survey URL can be copied and pasted from the survey (see screen shot below)



The link can be sent to the respondent via any media such as email, posted on Twitter, LinkedIn, and Facebook or published on your web site.

To embed the survey in an IFrame on your web site, copy and paste the above html in the IFrame URL field. Choosing 'Run in IFrame' will also remove the header and footer elements of the survey.

Responses received are not associated with a customer record in CRM but they can be used to create leads, if the 'Create Lead For Anonymous Responses' attribute is set to 'Yes' as above. In order to create the lead, the questions should use the appropriate mappings (see mapping section)

- Salutation
- First Name
- Last Name (Required)
- Job Title
- Company
- Web site
- Email
- Street1

- Street 2
- Street 3
- City
- Telephone
- Fax
- State
- Postal Code
- Country

Non Anonymous

Respondents are sent a link that is *specific* to that individual customer such as

https://www.mojosurveys.com/Demo2/example-questions/010Ufa54EeKq1gAVXSMOHKN5Zzc1

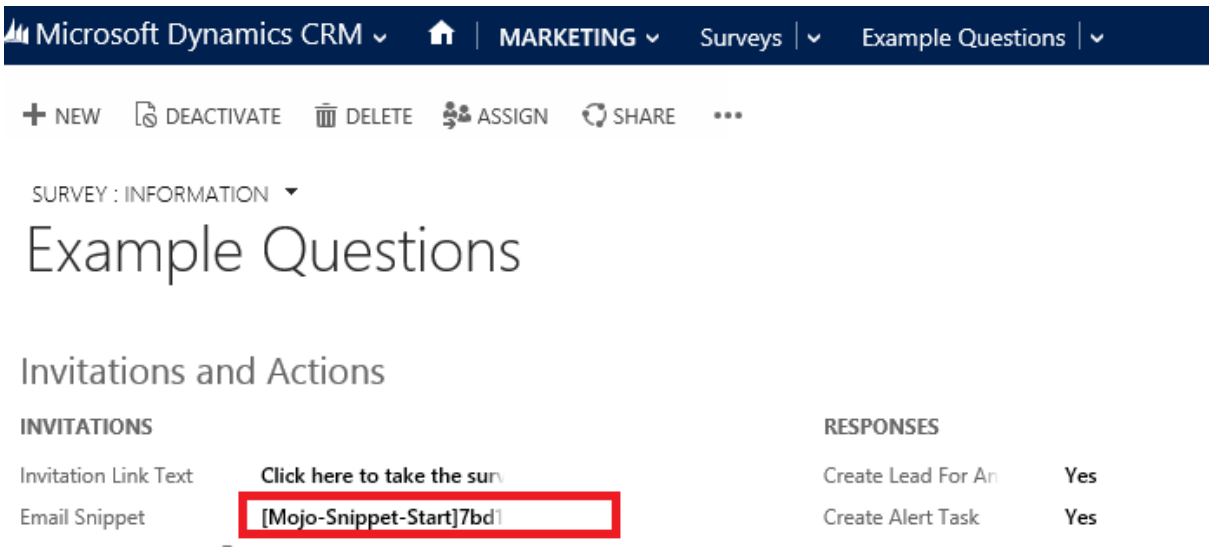
or

https://www.mojosurveys.com/Demo2/example-questions/982WgK54EeKq1gAVXSMOHAXDwzo1

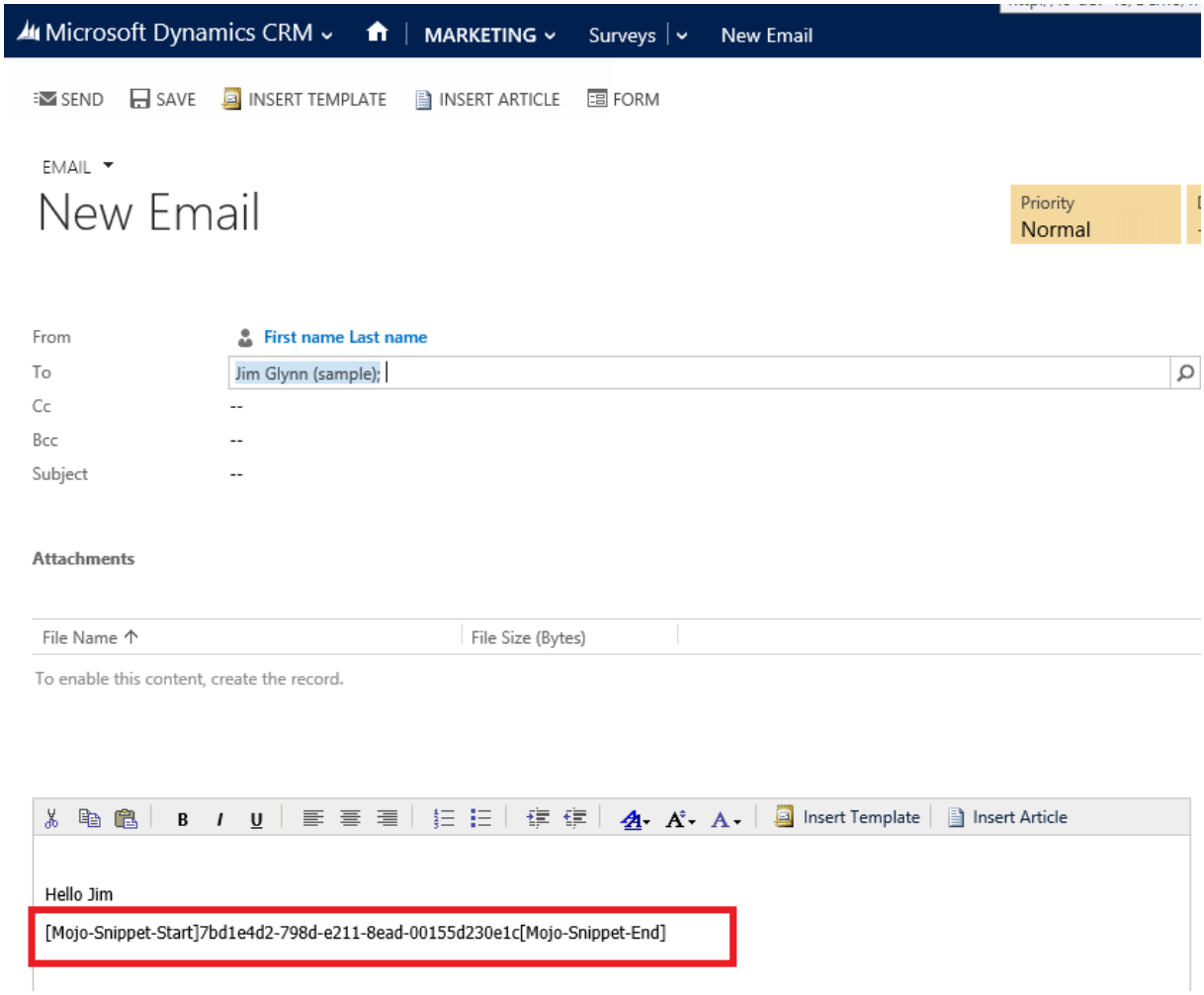
Note: These unique survey invitations do *not* contain any sensitive information or customer ID's, just identifiers of the survey activity.

These URL's are generated by creating a survey invitation or embedding the survey snippet into the body of an email.

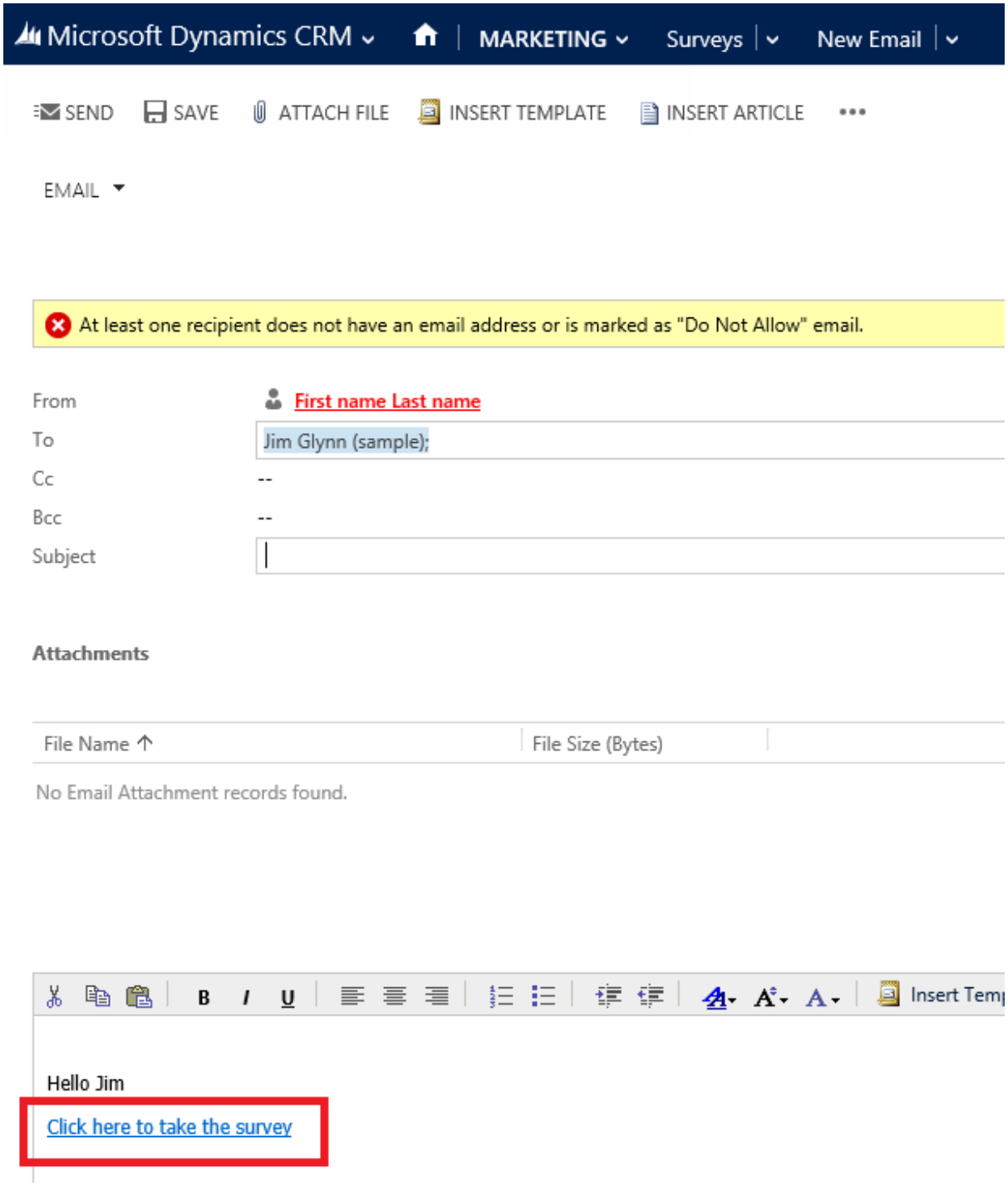
The survey snippet can be found as a field on the survey entity once the survey is published as shown below.



If we create a new email and copy and paste the survey snippet into the body as described below:



When we save the email, the snippet text has been changed to



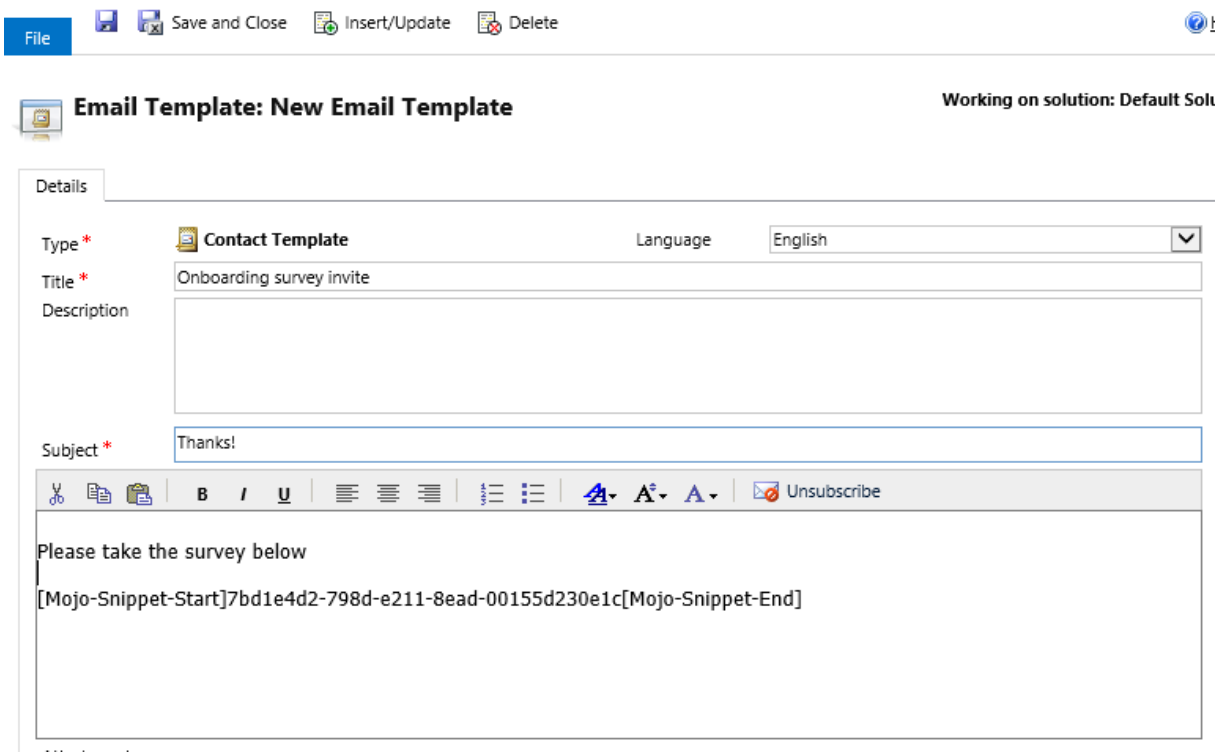
We think of the Survey Snippet as the "cookie cutter" to create the individual invitations (which are the cookies).

The snippet can also be modified to pipe (embed customer data) to the survey. For more information, see Piping Section

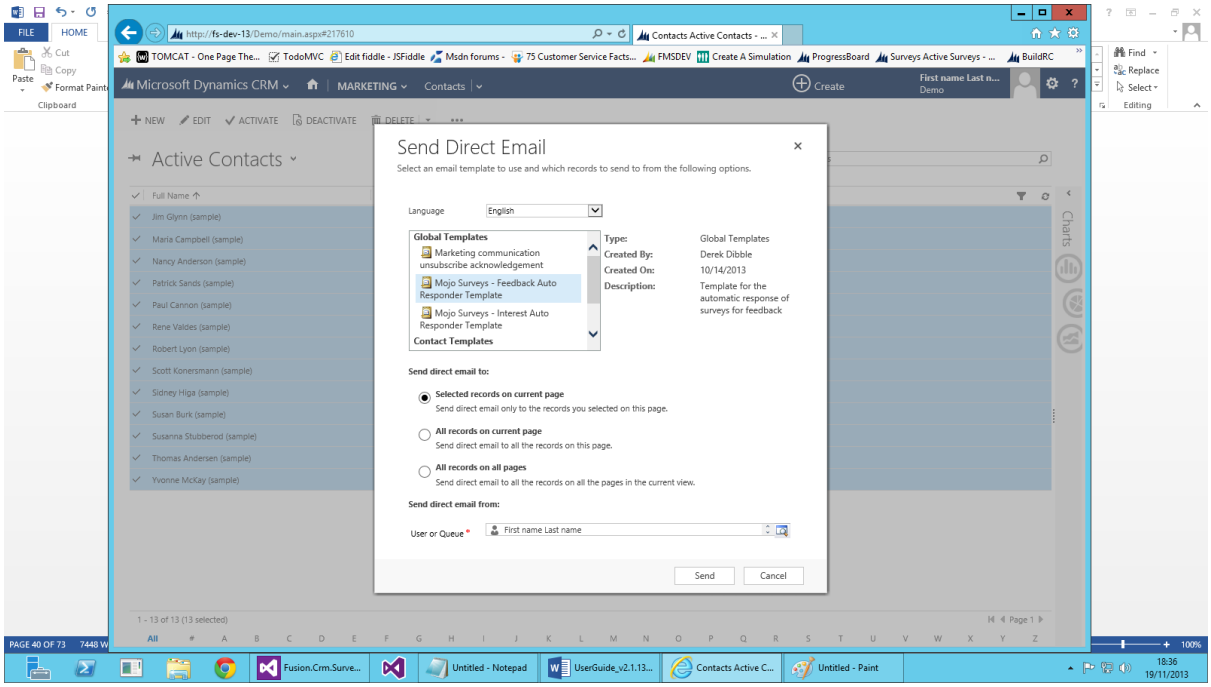
Replacing the Survey Snippet with customer specific survey URL will work for any email in CRM. Here are a few examples:

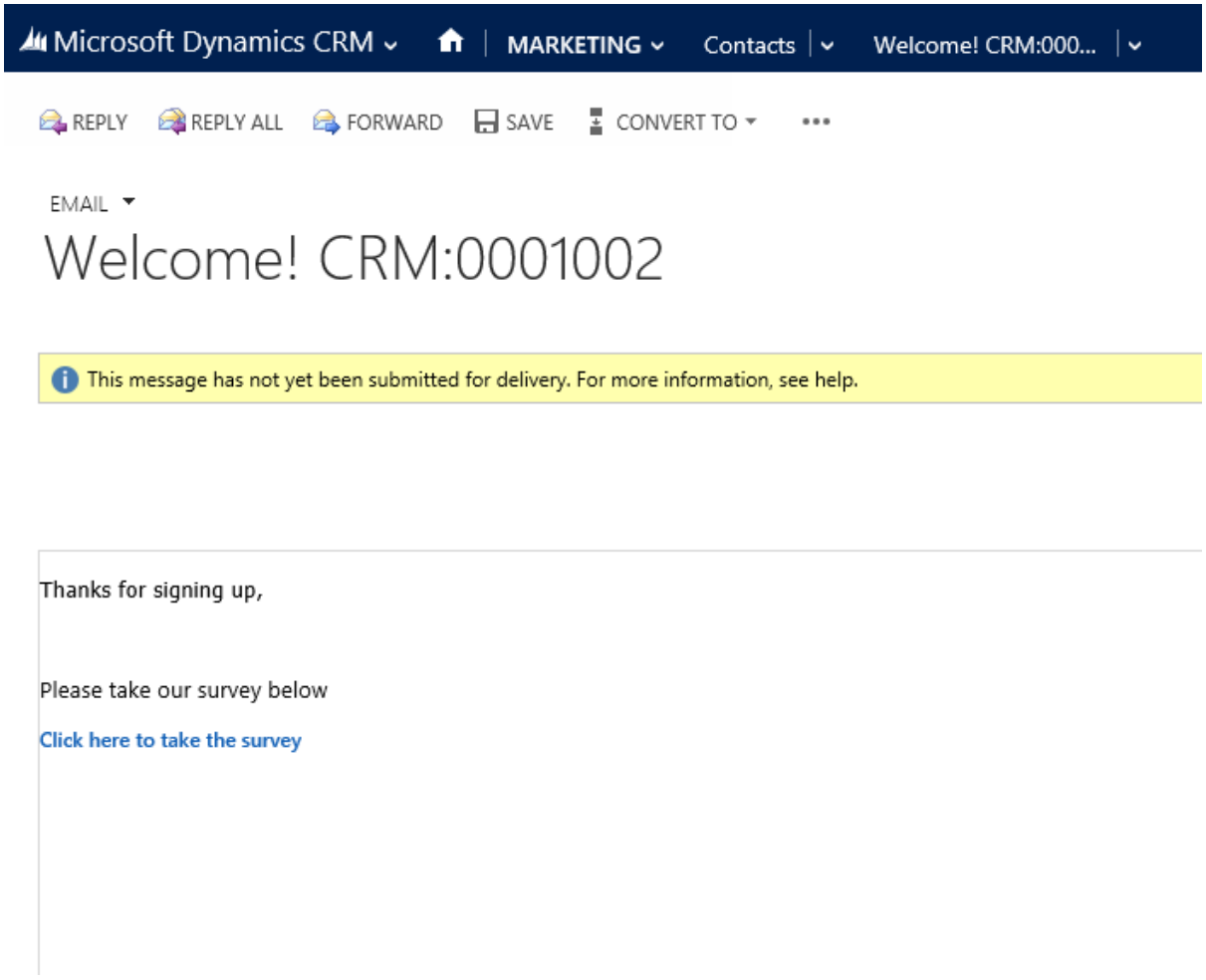
Sending Email Invitations Using a Template

Create an email template for the survey:


File
Save and Close
Insert/Update
Delete
Email Template: New Email Template
Working on solution: Default Solu
Details
Type *
Contact Template
Language
English
Title *
Onboarding survey invite
Description
Subject *
Thanks!
Unsubscribe
Please take the survey below
[Mojo-Snippet-Start]7bd1e4d2-798d-e211-8ead-00155d230e1c[Mojo-Snippet-End]

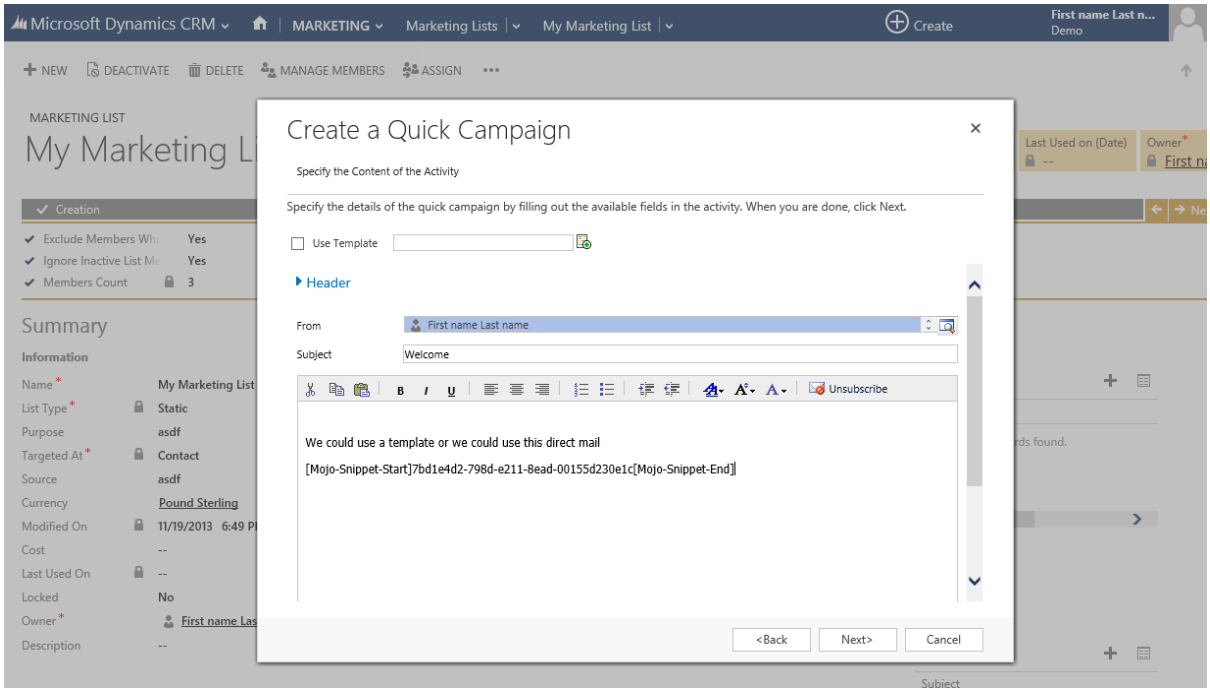
Send emails directly …

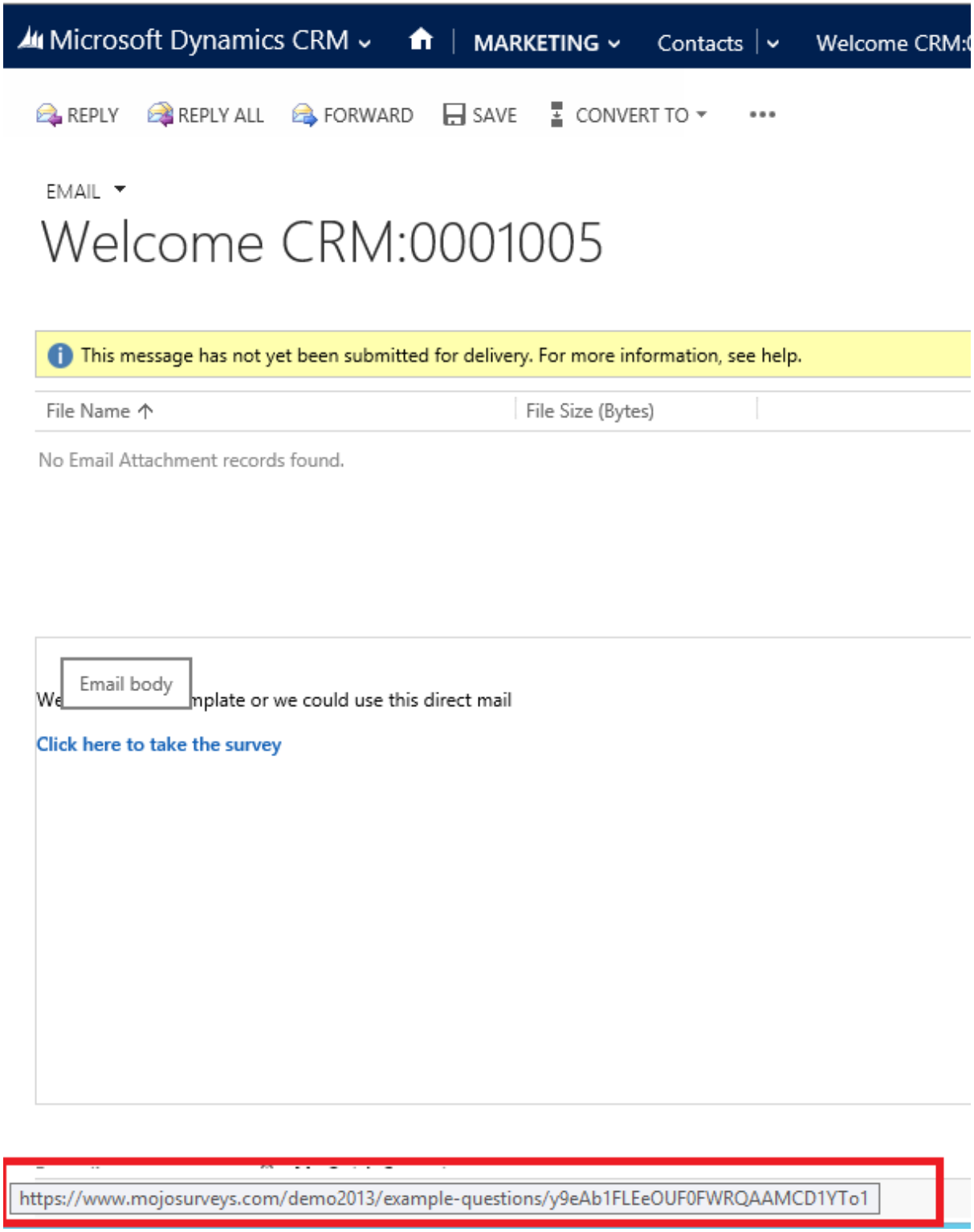

Send Direct Email
Select an email template to use and which records to send to from the following options.
Language
English
Global Templates
Marketing communication unsubscribe acknowledgement
Mojo Surveys - Feedback Auto Responder Template
Mojo Surveys - Interest Auto Responder Template
Contact Templates
Type: Global Templates
Created By: Derek Dibble
Created On: 10/14/2013
Description: Template for the automatic response of surveys for feedback
Send direct email to:
Selected records on current page
Send direct email only to the records you selected on this page.
All records on current page
Send direct email to all the records on this page.
All records on all pages
Send direct email to all the records on all the pages in the current view.
Send direct email from:
User or Queue *
First name Last name
Send
Cancel
Active Contacts



Quick Campaign

Email templates as described in the previous section can be used with by a Quick Campaign





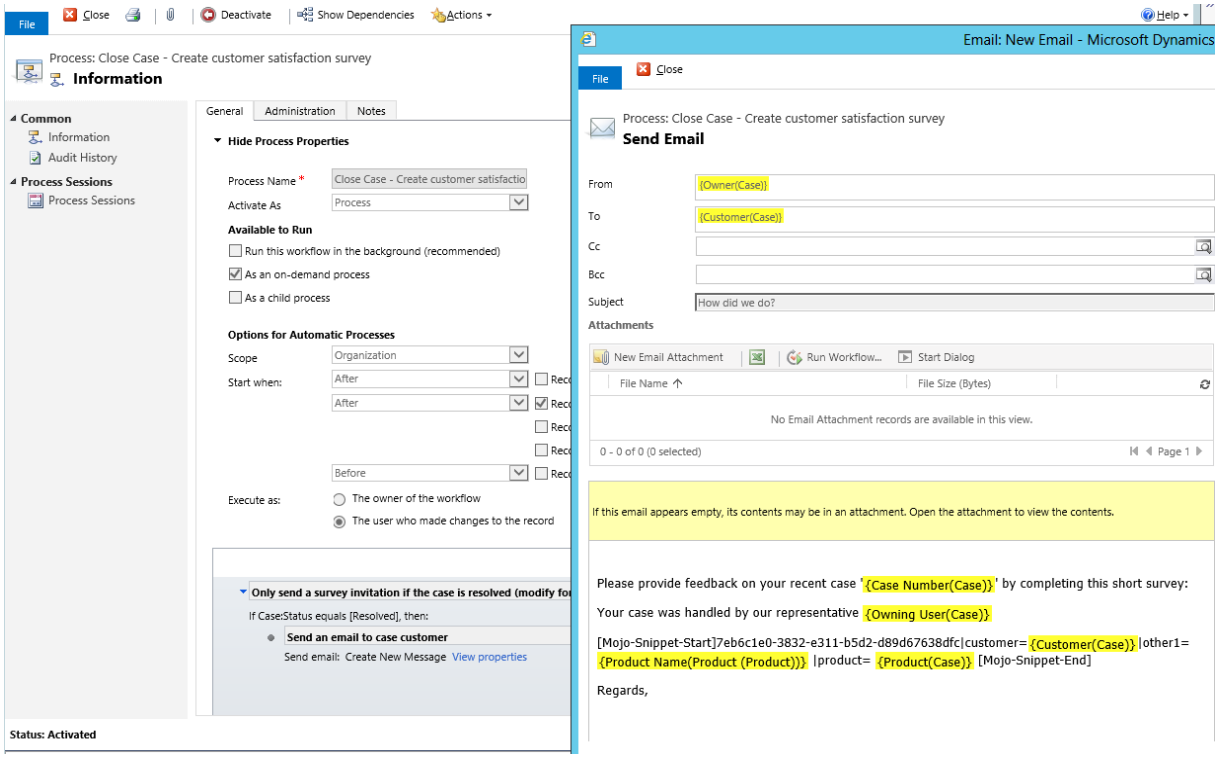
The above screen shot shows an email message generated for the quick campaign with the snippet replaced with a customer specific URL.

Quick campaigns can also be used to generate email's that are not based on a template.

Using Workflow to Generate Email Invitations

The ability to create survey invitations from a workflow is very powerful as it allows organizations to gather feedback after a particular event in the customer journey. So a typical example is to send out a satisfaction survey after a product or service has been purchased to gather feedback.

Below is a screenshot of an email that is generated from the workflow. If the Survey Snippet was pasted in the body, then each email generated would have a specific URL invitation.



The ability to Pipe data specific to that product or service makes workflow a great way to customise the surveys and make them more relevant to the respondent.

The following workflow demonstrates how to send a survey invitation after a case is closed. The workflow creates a survey invitation activity first and pipes in the Customer Service Agent name to the survey. The workflow then creates an email using the Invitation Link generated from the survey activity.

Campaigns and Campaign Responses

If emails are generated as part of a campaign, they too can embed the survey snippet either in the template or in the email body itself. The difference here is that campaign responses are automatically generated when the survey response is received.

Invitations only

Alternatively, invitations can be created in their own right separately from emails.

Survey Invites (Survey Activities) can be created manually in the CRM User Interface, or automatically via workflows/dialogs/plugins/custom code.

There are several advantages of creating survey invites on their own without them being generated by emails:

- data can be piped to the survey
- Additional information can be associated with the survey invitation. This can be achieved through setting
    - the 'regarding' field
    - any of the OOB fields on the survey activity such as 'Stage' or 'Reminder'
    - Any additional custom fields to the entity
- The activity is not an email activity – it could be a telephone survey for example.

Adding additional data should be considered for reporting reasons, so that the survey responses can be analysed 'before' and 'after'.

Another scenario to consider is when the invitation is sent via a non CRM email – i.e. through a third party email provider.

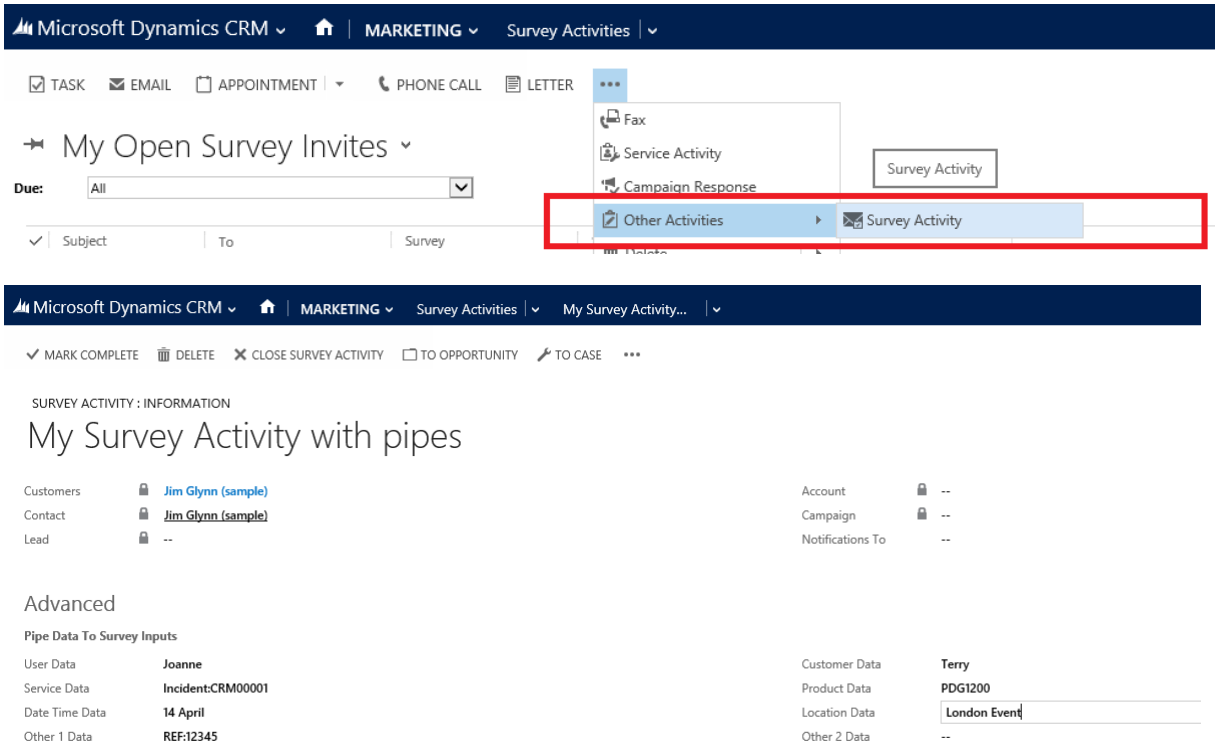
Piping

Piping is the term given to embedding a piece of specific customer data in a survey. This has the advantage of making the survey more relevant to the customer and as a consequence, improve response rates. Examples of data to be piped are

- User data (Call Centre Agent's Name)
- Customer Name
- Service Name
- Product Name
- Date Time
- Location

Caution! We don't recommend sending your customer's full name to the survey for security reasons.

In order for the data to appear in the survey, the data should be set in the appropriate pipe field on the survey activity (see screenshot below) or the Mojo Survey Snippet can be modified



To embed the piped data via the survey snippet, pipes can be embedded with the following syntax:

[Mojo-Snippet-Start][ID]|[PIPE_NAME]=[PIPE_VALUE][Mojo-Snippet-End]

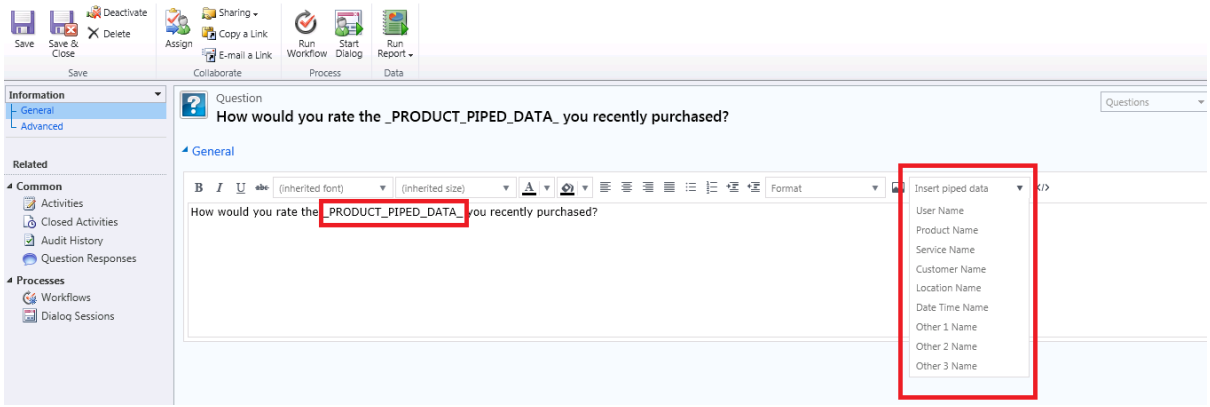
e.g. to embed the user name, customer name and location in the survey,

[Mojo-Snippet-Start]95a5b77d-xxxx-e211-b494-d4856451bcd1|user=Colin|customer=Ms Jones|location=store[Mojo-Snippet-End]

Pipes names available are:

- user
- customer
- product
- service
- datetime
- location
- other1
- other2

To use the embedded data in a question within a survey, the question should contain a pipe snippet. The easiest way to insert piped data is to choose the pipe data you want from the text editor. In the example below we are piping the 'Product Name' into the 'new product rating' question



The pipe data snippet can be included in most survey components including questions, grids, answers, sections and titles.

Note: If there is no data supplied the pipe will not be replaced so please ensure there is validation logic at the time of the survey invitation creation to ensure that invitations are not sent with missing piped data.

Question responses can be pre-populated with piped data to help respondents complete the survey. For example you could pre-populate the user name of the employee that served the customer, but still allow the respondent to change the employee name.

Any additional information can also be piped to the survey, so it maybe that you want to display a customer reference number or a voucher code at the end of the survey that is specific to that respondent.

How does it work?
When an invitation is created, a plugin checks to see if we have a pipe record already in CRM and if so, it creates a new record AND creates a record on the Fusion Software server. The invitation link contains the encoded pipe ID's for that record e.g.
https://www.mojosurveys.com/Demo2/piped-data-example/HJlz6rC0EeK8QAAVXSMOHA3h9QUOwusLD6PhERCE1xcRZc0dEkbDIxMnuSlku_o60

Here is the piped data embedded in the survey (note the piped data in the header of the survey):

Piped data example for Terry

Piped data

Embedding customer specific data (piping) has several advantages:

- make the survey more relevant for the respondent
- increases quality of the responses by reminding the respondent of exactly what you want to ask them about
- improves response rates

Piped data is attached to the creation of the survey invitation

It's possible to pipe any data to the survey in many locations including

- Question text
- Answer text
- Grid text
- Section text
- Header text

Mojo Surveys has built in pipes for

- Customer name (highly recommend first names only for security reasons)
- Location
- Product
- Service
- Date Time
- User Name

Here is some example piped data:

- Customer: Terry
- Location: London Event
- Product: PDG:1200
- Service: Incident CRM:00001
- Date Time: 14 April
- User Name: Joanne
- Other 1:REF:1235

How would you rate the PDG:1200 you recently purchased?

For a working example, please see the 'Piped Data Example' survey supplied with Mojo Surveys.

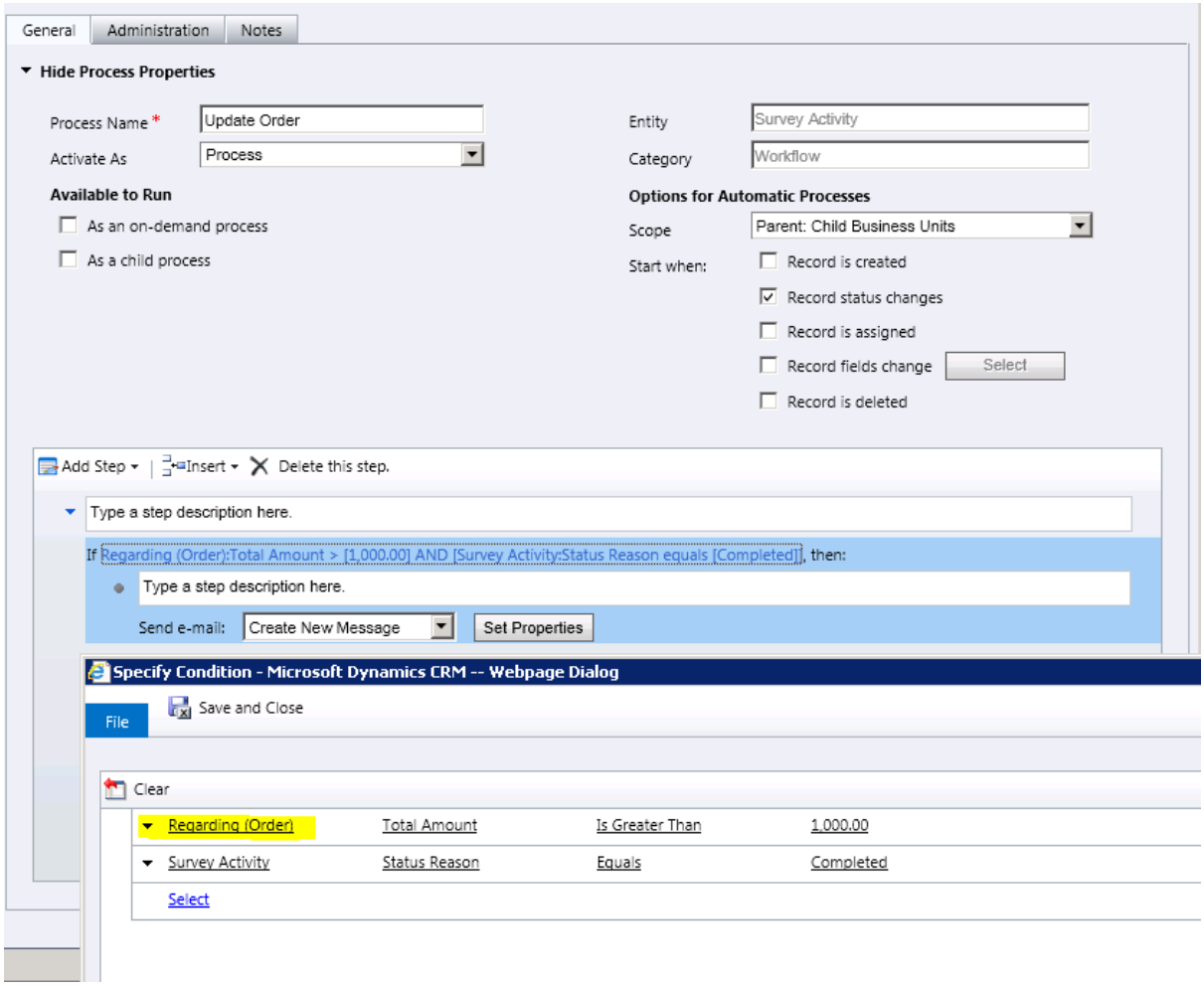
Pre-populating with data

It is possible to pre-populate one or more surveys questions based on the survey URL. For example, in an email to the respondent an organization may provide 5 smiley images to reflect how satisfaction with a service and each image had a separate URL. To accomplish this task, the individual questions need to be configured to be pre-populated (see single response Question section) and the URL that is returned from the survey invitation should be appended with ?a=1,b=2.

Advanced Tips

If custom reporting or custom workflow is required on the survey response, then additional attributes can be added to the survey invite or the 'Regarding' field can be used to create a relationship to a custom entity. Adding data to the invitation makes it readily accessible from reports or workflows that run on the survey response, as the response contains a relationship to the survey invite activity.

For example, you may want to create a survey relating to an Order. By setting the regarding object to the Order, the survey activity is visible in the activities pane for that order and workflow on the survey response can interact with the Order to check status and other conditions



Actions

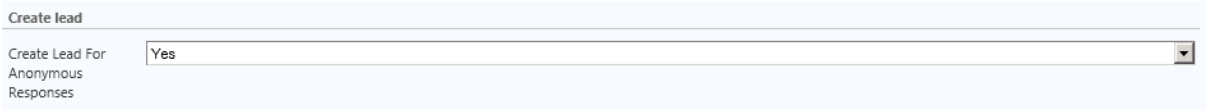
Responding to a customer's feedback is usually very important particularly if they have expressed dissatisfaction in any way. A simple acknowledgement can mean a great deal to the respondent and go that one step further towards a conversation.

There are several options that are available out of the box from Mojo Survey as well as the ability to extend Mojo Surveys to take custom actions.

Built-in actions include:

Auto Create Lead

A lead is automatically created for a survey response that is taken by an anonymous respondent. To create the leads, the survey questions should be mapped to the lead attributes. See mappings section



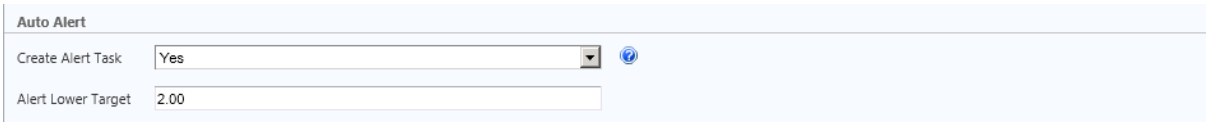
Auto Responder

Automatically send an email response back to the customer (account / contact / lead) using a global email template. The template is specified on the survey as shown in the screen shot below:

When a survey response is received the email is automatically sent to the customer.

Auto Alert

This is a simple way to create a task for the survey owner based on the value of the question mapped to the Customer Satisfaction mapping.



For more advanced alerts see server side routing section below.

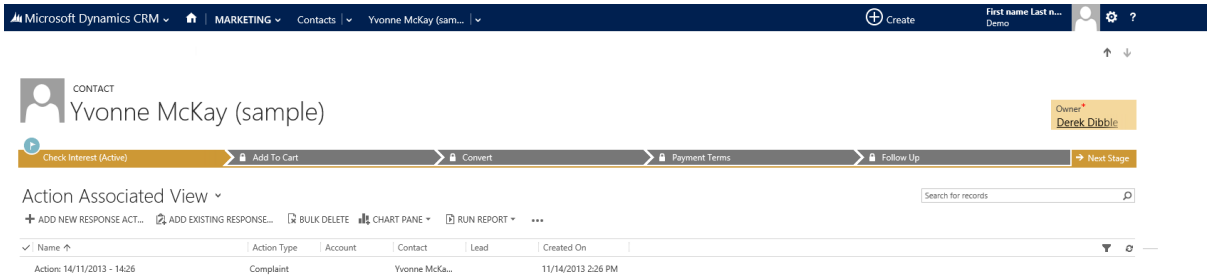
Unsubscribe a respondent

For more information see the unsubscribe section.

Server side routing

'Response Action Rules' are server routing rules that can be configured to check the responses from more than one question and create 'Response Actions' if the conditions are met.

Any Response Actions created are visible on the customer record as shown in screenshot below:



Custom Workflow can be configured to run on the Response Actions to perform any action required. By default there the following types of Response Actions:

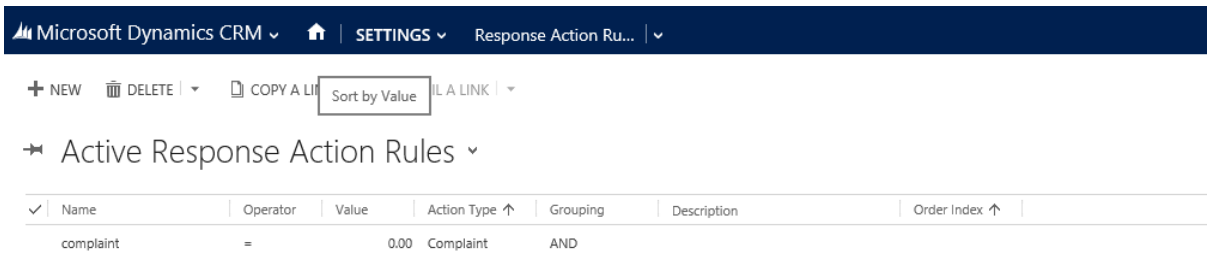
- Complaint
- Low Score
- Distress
- Unsubscribe
- High Score
- Contact Request
- Follow up

Response Actions have the related text of questions that met the criteria. They also allow business users to define who should be notified and which queues if any should be used.

Response Action Rules are found under Settings.

The Response Action Rules are configured to work with one or more Linked Questions and so each rule can be configured to work across multiple surveys.

Fields such as 'Queue to notify' and 'User to notify' are available for any custom workflows to use and improve configurability.



Custom workflow / Custom processes

Custom workflow can be easily configured to run on the survey response, survey invitation, or Response action entity. If you are using custom workflows to take an action based on a question response, it is recommended to use mappings and store the result on the survey response. The workflow can then run on the survey response rather than the question response.

Fusion Software have provided some template examples including the following

Mojo Surveys - Template: Create Alert	Workflow	Survey Response
Mojo Surveys - Template: Create Case Customer Satisfacti...	Workflow	Case
Mojo Surveys - Template: Create Complaint Email	Workflow	Response Action
Mojo Surveys - Template: Create Lead	Workflow	Survey Response
Mojo Surveys - Template: Create Low Score Alert	Workflow	Response Action
Mojo Surveys - Template: Notify Survey Admin Of Error	Workflow	Log
Mojo Surveys - Template: Process Custom Action	Workflow	Response Action
Mojo Surveys - Template: Unsubscribe respondent	Workflow	Survey Response
Mojo Surveys - Template: Update Case With Customer Sa...	Workflow	Survey Activity

Fusion Software or your partner of choice can help create workflows to meet your requirements.

Reporting

All the responses from the surveys are stored in CRM and can be reported against using the built-in CRM tools such as

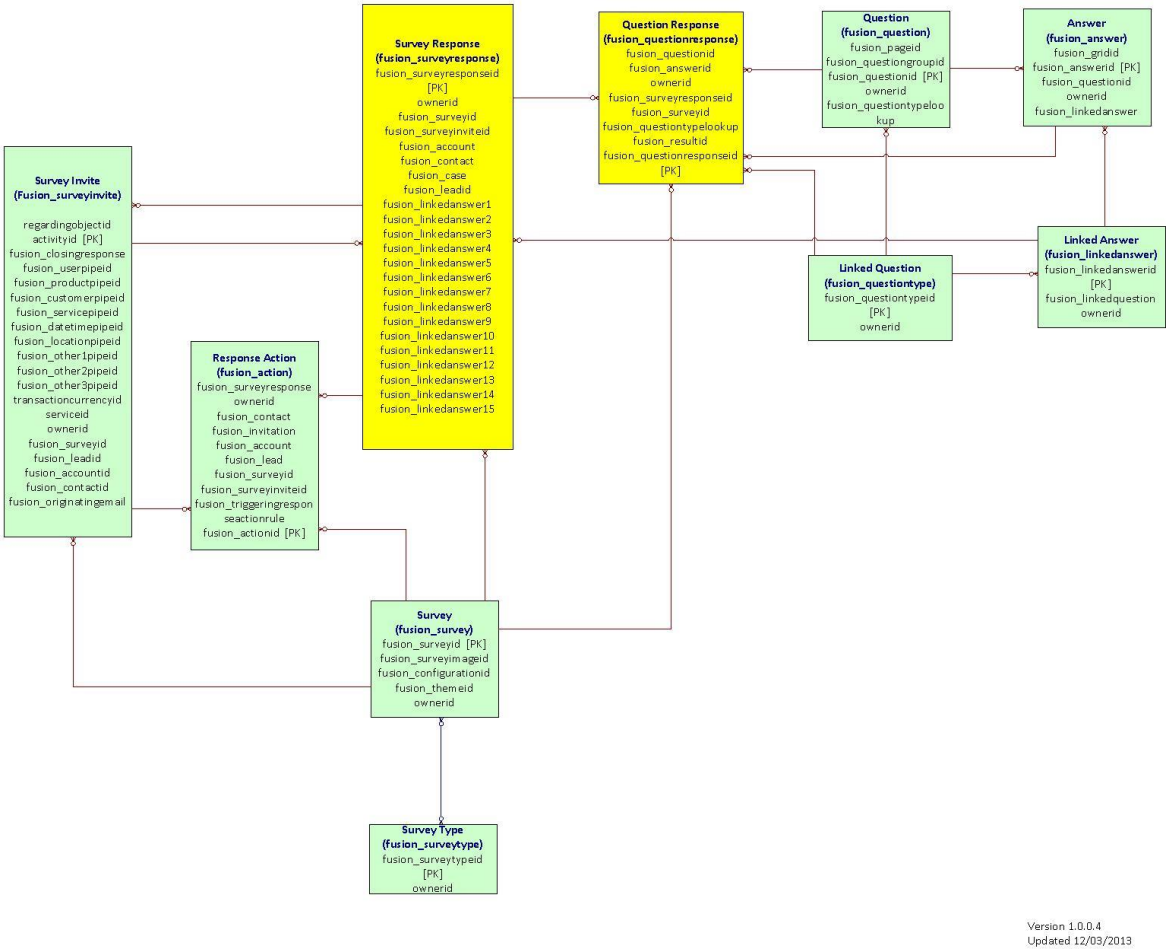
- Dashboards
- Views
- Related entities – i.e. all survey surveys responses related to a survey can be viewed from the Survey; all Question Responses for a question can be viewed by navigating to the question.
- Advanced find
- Exporting to Excel
- OOB Mojo Surveys Reports – such as Summary Report
- Report wizard
- Custom reports

The advantage Mojo Surveys has over other survey tools is that the data is stored in CRM so that it can be used in conjunction with customer data. So for example find all survey responses for customers that have placed an order in last 3 months.

Note that for the Questions, Grids, Answers, Linked Answers and Linked Questions, you can specify the 'Reporting Text' that is displayed, and abbreviate/change to suit.

Response Data Diagram

Entity Relationship Diagram For Mojo Surveys Outputs



A record is created for each survey response per customer and there are many question responses for each Survey Response.

Using mappings it is possible to de-normalise the data from the Question Response to the Survey Response.

Dashboards

There are currently eight dashboards available out of the box:

- Mojo Surveys - Customer Effort Score (CES)
- Mojo Surveys - Main dashboard
- Mojo Surveys - NPS
- Mojo Surveys - Overall satisfaction
- Mojo Surveys - Responses
- Mojo Surveys - Responses Analysed By Question
- Mojo Surveys - Satisfaction by survey
- Mojo Surveys - Smart Response Grid

The main dashboard should be used to gain an overview of the surveys and in particular this is where the survey logs are viewed.

Advanced Find

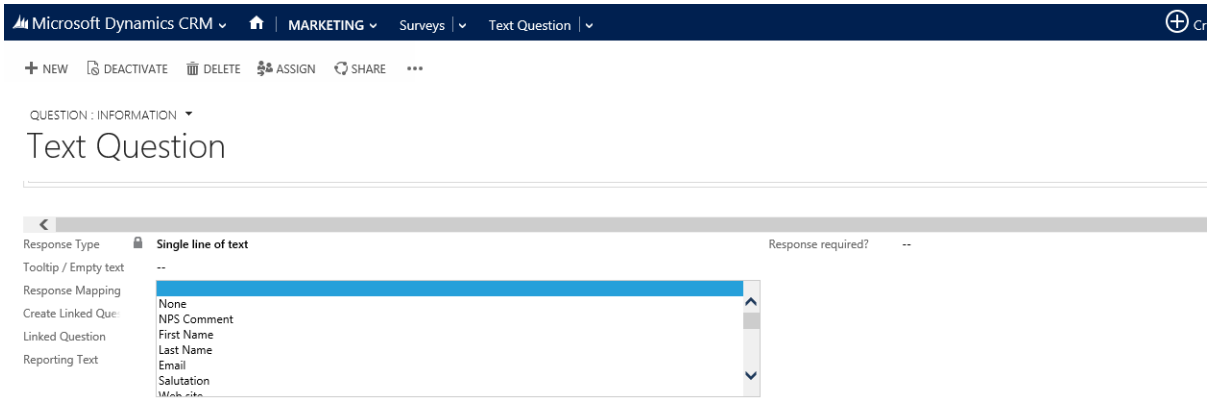
Advanced find is usually a good starting point to identity the data you want to view.

Response Mapping / Linked Answers

Question Response data can be stored on the survey response entity in Response Mapping. This gives the advantage of making the data much more readily available to Reports and Workflows. There are many mapping fields on the Survey Response as listed below:

City Response	Custom Date 2
Company Response	Custom Date1
Country Response	Custom Integer Value 1
Customer Effort Score	Custom Integer Value 2
E-mail Address	Custom Integer Value 3
EmailResponse	Custom Integer Value 4
Fax	Custom Integer Value 5
First Name Response	Custom Number 1
Job Title Response	Custom Number 10
Last Name Response	Custom Number 11
Linked Answer 1	Custom Number 12
Linked Answer 10	Custom Number 13
Linked Answer 11	Custom Number 14
Linked Answer 12	Custom Number 15
Linked Answer 13	Custom Number 16
Linked Answer 14	Custom Number 17
Linked Answer 15	Custom Number 18
Linked Answer 2	Custom Number 19
Linked Answer 3	Custom Number 2
Linked Answer 4	Custom Number 20
Linked Answer 5	Custom Number 3
Linked Answer 6	Custom Number 4
Linked Answer 7	Custom Number 5
Linked Answer 8	Custom Number 6
Linked Answer 9	Custom Number 7
Postal Code Response	Custom Number 8
Salutation Response	Custom Number 9
Satisfaction Rating 1	Custom Value 1
Satisfaction Rating 1 As Int	Custom Value 2
Street1 Response	Custom Value 3
Street2 Response	Custom Value 4
Street3 Response	Custom Value 5
Telephone Response	
Website Response	

Questions can be mapped by choose the appropriate mapping on the question record (see below)



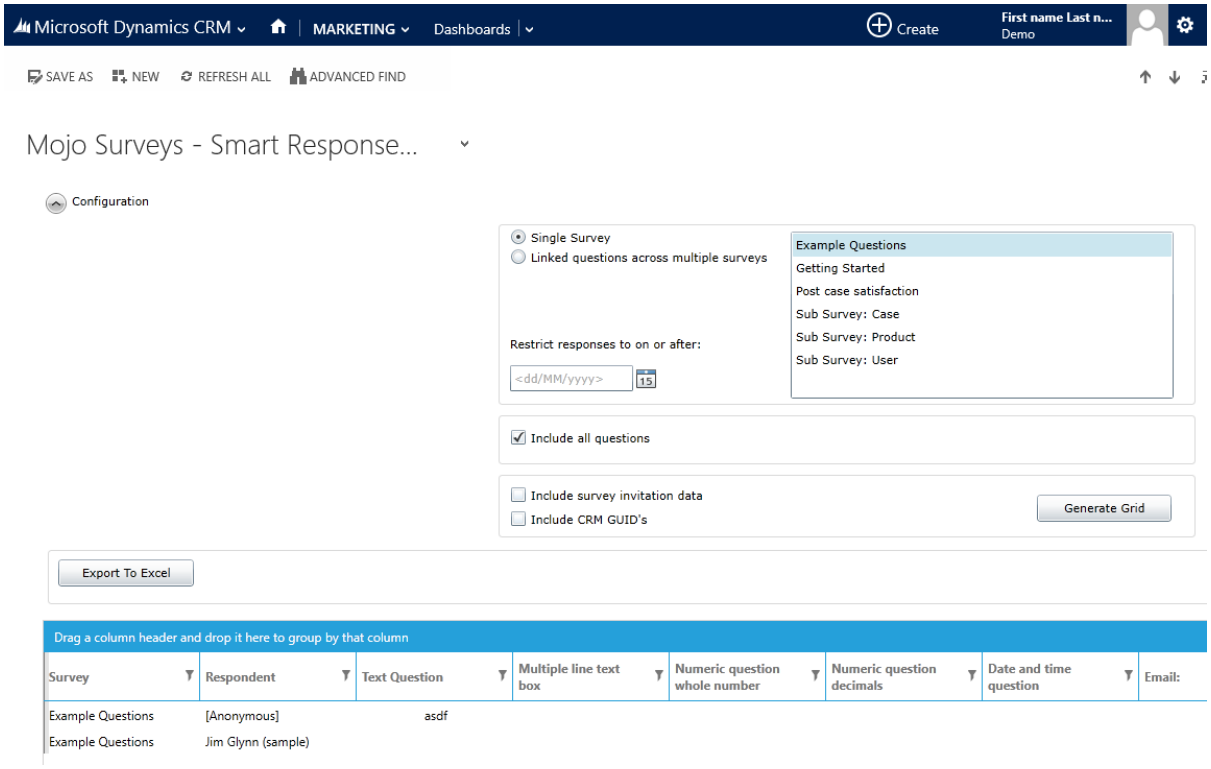
Mapping a single select question that has a Linked Question to a 'Linked Answer 1' mapping will result in the linked answer being stored in 'Linked Answer 1'. This is very useful when using the response in workflow or reporting.

Importing Translations

If you only have a single survey in your CRM that uses mappings, or multiple surveys that don't share the same mappings, it's possible to rename the mappings via exporting and importing the translation file. However, the file will need to be re-imported every time the Mojo Surveys solution is imported so this may not be ideal solution.

Smart Grid

In order to export the survey responses to Excel and other applications for further data analysis, Fusion Software has created a Smart Grid that enables some or all of the data to be extracted easier without the requirement to transpose in Excel. It is recommended users review the Fusion Feedback functionality that provides enhanced functionality.

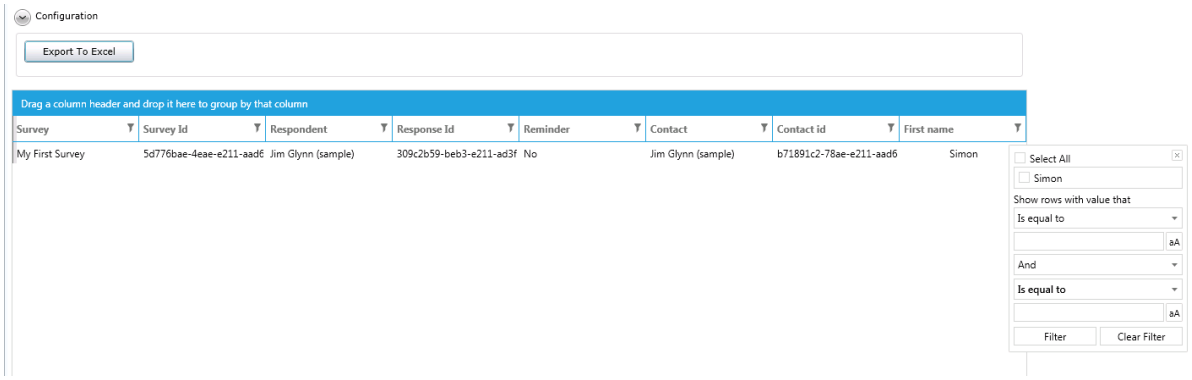


There are options here to export a single survey or to export linked questions from multiple surveys. In addition you can export on or after a particular date.

You can choose to export all questions, or just a selection.

Optionally, also export survey invitation data and CRM GUID’s.

Once the options are selected then choose ‘Generate Grid’.



You can see you have the options to filter the results further and these can be nested. So it's very easy to see all the responses that answered 'yes' to Q4 AND gave a satisfaction rating > 4. For complex filtering we suggest Excel is the best tool for this.

In this view, it's also possible to group by responses, so you can view all the answers grouped by rating.

Excel

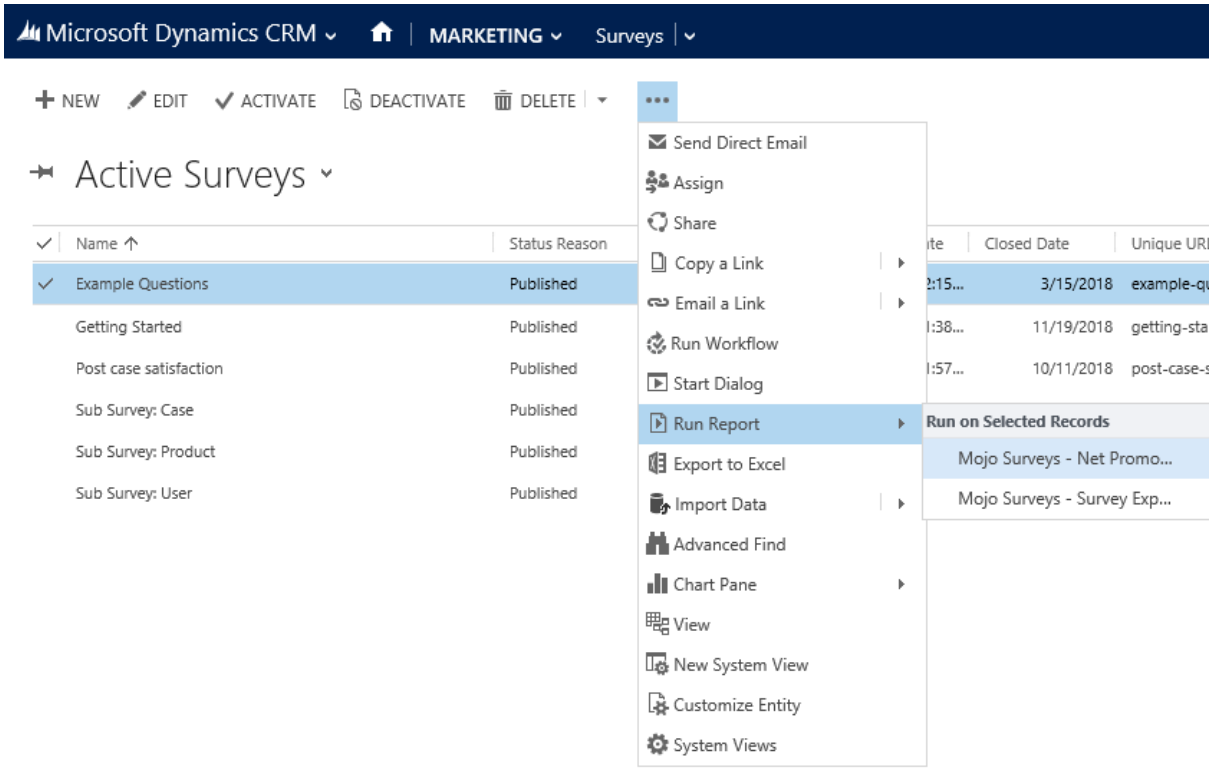
For more complex analysis of the responses we recommend exporting to SQL Server or Excel to utilise the powerful features built into these products.

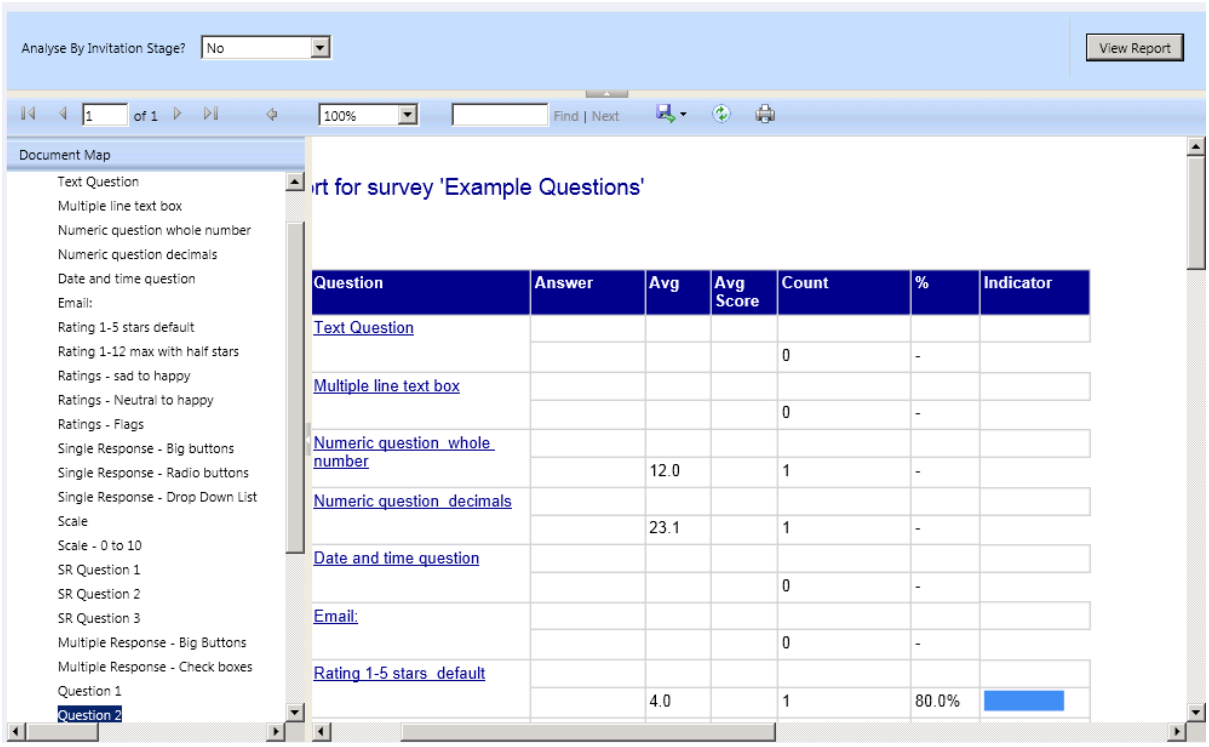
Custom entity

Another option is to create a custom entity specifically for the survey results. This has the advantage of having known field names (rather than Custom 1, Custom 2 etc.) that make advanced find, workflow, reporting much easier. Currently, custom entities would need to be created manually and a workflow populate them based on the Survey Response. Fusion Software is looking into automating this process, so if you have specific requirement for this, we'd love to hear from you.

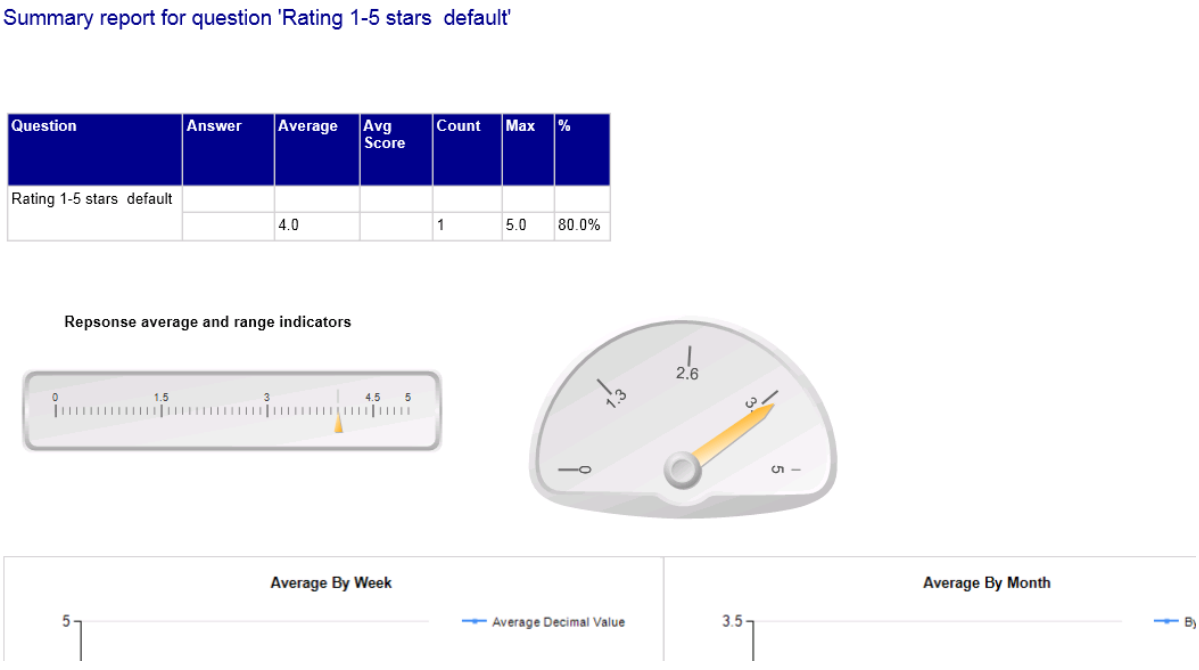
Summary Report

The summary report is run from the survey list report as below:



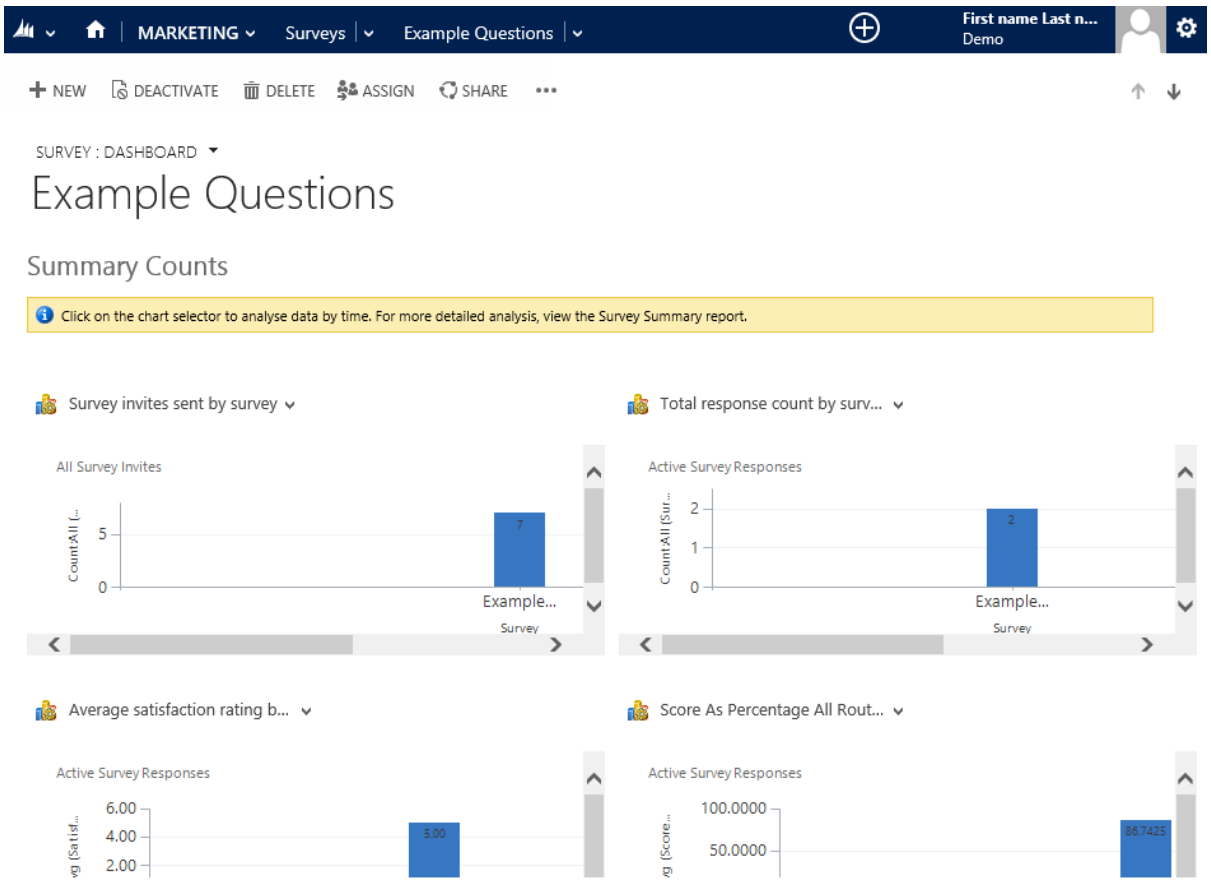


Clicking through on the question hyperlinks displays the summary data for of the question



Survey Dashboard

The survey dashboard provides an overview on a survey-by-survey basis.

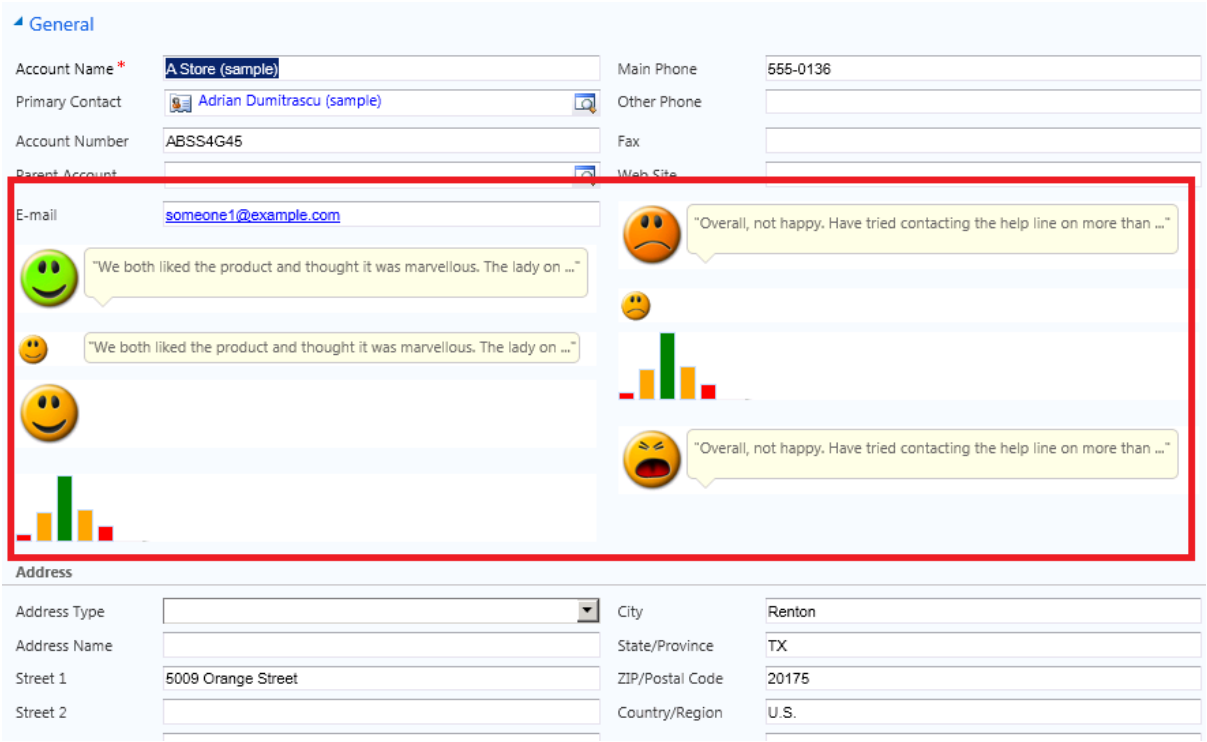


Customer Record Indicators

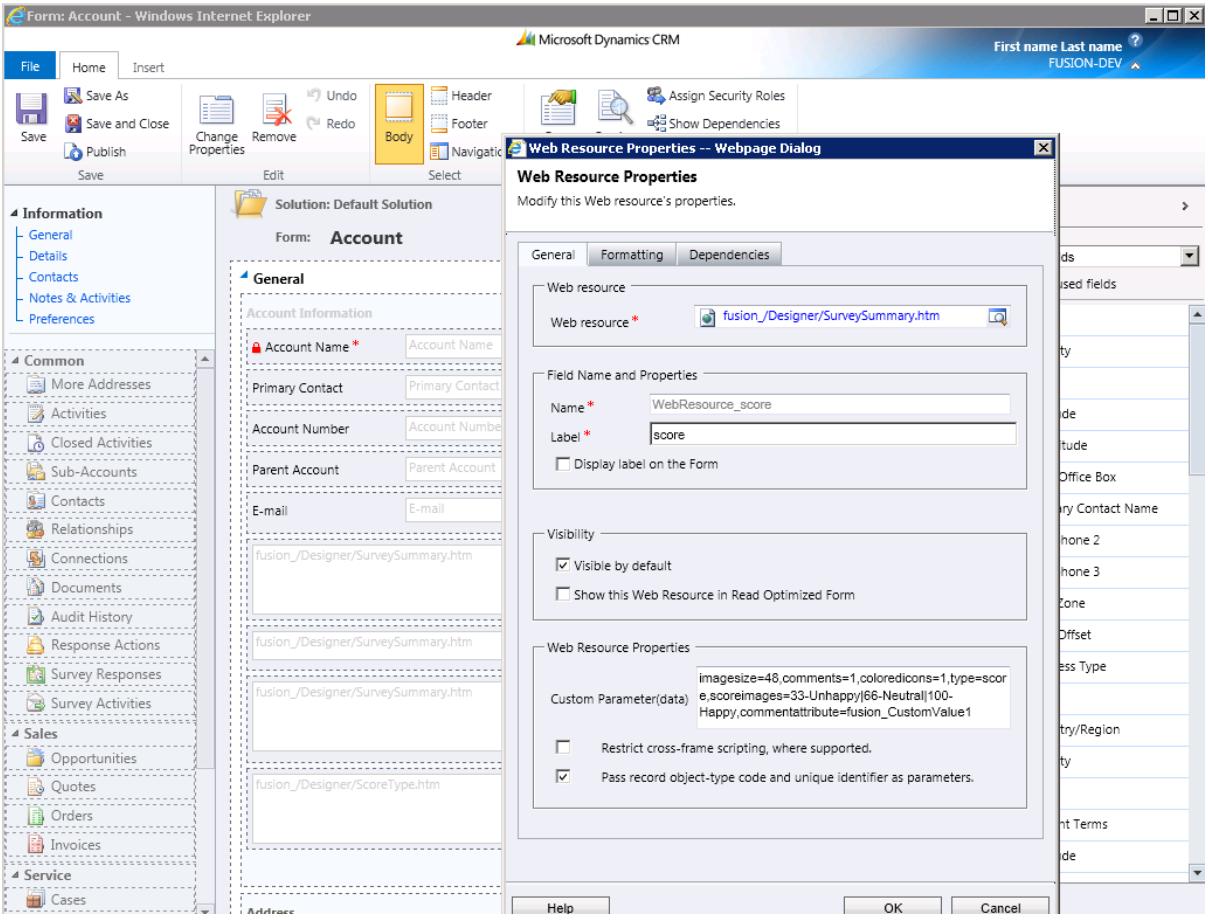
Smiley's can be used as an effective way of communicating the past correspondence with the customer to the CRM user very quickly. The screenshot below contains a selection of possible configurations including

- Coloured smiley
- Small or large image
- Custom images
- Smiley's based on a range (1-5), NPS, or Score (0-20, 21-40, 41-60, 61-80, 81+)
- Indicator of last comment
- Historical bar chart of previous score

By default, these are **NOT** installed on the customer record (account, contact, lead).



To add these to a customer record, browse to the form designer and add a web resource as below



Parameters

Parameter Name	Values	Comment
type	ces,nps,csat,score,	
imagesize	24 or 48	Optional. Default 48.
comments	1 or 0	Optional. 1 to show, 0 to hide. Default is show comments.
commentattribute	Text attribute on survey response.	Default is 'fusion_CustomValue1'. Case sensitive.
coloredicons	1 or 0	Optional. 1 to show, 0 to hide. Default is true.
small	1 or 0	Optional. 1 is small, 0 is large. Default is small.
scoreimages	Pipe separated array of –separated numeric, image name pairs.	E.g. 33-Crying|66-Neutral|100-Love Choose your own icons for a given range.

Security

There are four security roles that are supplied with Mojo Surveys:

Role	Comments
Survey Administrator	Access to configuration and settings
Survey Designer	Can create and edit surveys
Survey Service	Least privilege role, used for creating survey responses only. **Cannot** create new activities or read customer records.
Survey User	Can read all aspects of the survey. The license is based on the number of users related to this role.

FAQ

What happens when there's an error

Depending on the error, a log entry maybe created in CRM, please check the Mojo Surveys – Overview dashboard regularly.

Where are the Fusion Software servers based?

Currently they are hosted in the Microsoft's Windows Azure Datacentre Northern Europe (Ireland with a failover to Holland), but the data centre location *could* change in the future (we have no plans for this currently). If you require a specific region or data centre then please contact us.

What happens if Fusion Software's server goes down?

If the public facing web site goes down, then respondents won't be able to take any new surveys. If the respondent has submitted data and then the server goes down, the data is saved to a queue until the server back online. The queued data will get processed in the order it was inserted (this may take several hours depending on the outage).

Customizations – What can I customise

We want Mojo Surveys to be open and as customizable as possible rather than supply a locked down product. However, please consider that additional customizations are your responsibility in terms of maintenance and transferring between environments. CRM Solution best practices apply here, so form customization (new attributes) should be added in a new section. When you import an upgrade to the solution file, you are required to overwrite the existing customizations rather than maintain them.

We suggest any changes you make are made in a separate, unmanaged solution – we usually call this 'Mojo Surveys – Custom Modifications'.

Processes should follow the patterns described in the process templates provided.

Multi-lingual

Multi-lingual Surveys can easily be created by using linked questions so that a survey is created for each language, with questions in each using linked questions. Different invites can be sent to each survey based on their registered culture.

Are there any server components we have to install?

No, when an environment is commissioned, we import a CRM solution only. The server files reside on the Fusion Software Servers – you don't have to worry about them!

I see an entity called 'Survey Type'. What are Survey Types?

Survey Types are entities that allow you to group surveys together for reporting or workflow purposes. So it could be that you have a workflow so that all responses with a score < 20 and Survey Type equals 'Customer Satisfaction' have a task created. They are a practical way of filtering the data.

How can I change the password for the service?

If you are using the Push method of integration whereby the responses are pushed from the Fusion Server to the CRM server, then please contact us for secure methods of changing the password.

Please email support@fusionsoftware.com (do not send the new password). We strongly recommend that the push service has least privileges and with just the Survey Service Account security role.

Can I add any HTML in questions?

Most rich text tags are allowed, however some elements are not allowed for security reasons. JavaScript is not allowed

Troubleshooting

Why can't I see all my results?

Depending on the type of license, results may take an hour from the time they were submitted by the respondent to being created in CRM.

If you still haven't seen anything after an hour, check the log's for a 'Heartbeat' entry in the Mojo Surveys – Overview dashboard.

Also check the password for the service account (push installations only) hasn't expired.

Why isn't social sharing visible on my scale questions?

This can be caused because the 'Enable Social Sharing' attribute is not set on the Survey itself.

Contact details

As you would expect, we always welcome feedback. Please contact us via

support@fusionsoftware.co.uk

www.fusionsoftware.co.uk

with any feature requests, issues or advice.

References

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